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ABSTRACT

Curriculum materials are provided for courses to be taught in business labs, including typing I, advanced and production typing, office procedures (clerical and secretarial), recordkeeping, accounting I and II, consumer math, and business law. Introductory materials include suggestions for setting up labs and a listing of required and suggested courses for proficiency certificates for various business department majors. Provided for each course are: prerequisites, credit(s), basic minimum competencies, optional competencies, and learner outcomes. Additional materials include assignments for typing I; assignments/units for advanced and production typing and office procedures (clerical and secretarial) that specify objectives, materials needed, maximum time allowed, procedures/directions, and grading; tests for clerical and secretarial office procedures; review sheets for filmstrips in secretarial office procedures; and time schedules for clerical and secretarial office procedures, recordkeeping, accounting, consumer math, and business law. (YLB)

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BUSINESS LAB CURRICULUM

FINAL REPORT

Project No. 83-ANL(124)NB

Curriculum Development Project
Conducted Under Public Law 94-482

Cheri Dill
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Kettle Falls, WA 99141

December 1983

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RESEARCH COORDINATING UNIT
Washington State Commission for Vocational Education

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The project reported herein was performed pursuant to a grant from the Research Coordinating Unit of the Washington State Commission for Vocational Education. Contractors undertaking such projects under the Commission for Vocational Education sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Commission for Vocational Education position or policy.

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SUGGESTIONS FOR SETTING UP LABS

1. Use text materials and practice sets that you are familiar with.

   When you're setting up your Lab, you don't have time to spend going through new materials. Use the materials that you have on hand and develop simple assignment sheets. Because you're familiar with the program you'll know about how long it takes to do a specific section, and how many points should be allowed for it. Use your own experience as your guide.

2. Set up a point system that you can live with.

   One of the hardest things to do in a Lab is setting up a point system. What works for one person may be very difficult for you. It's necessary to be fair to the student, but remember that you are trying to push these students into accomplishing more and take more responsibility. Don't make the point system too easy. You'll regret it if you do. It's always possible to revise down at the end of a quarter, but impossible to go up on your grade scale.

3. Be prepared to have more than one test on each section.

   We require our students to pass every test with a grade of at least 80%. This often requires that the student take tests several times before he achieves the required competency. If your text materials have prepared tests, use them! Many texts are being used for individualized instruction and many of them have more than one test for each unit. As you go through the materials your first quarter, you'll get a pretty good indication of what units will need extra tests.

4. Be prepared to change your program.

   Don't be afraid to admit that something isn't working and if it isn't find out why. If you can't do anything about it, you will need to decide what to do. You may end up throwing something out. If something is working very well, you'll also have to consider expanding that area.

5. Set up a Recordkeeping system that you can handle.

   Don't expect to keep the grades for a Business Lab class in your grade book. It just won't work. Use score sheets for each unit that you are teaching. This gives you a readily accessible reference for grading and gives the student an opportunity to see how they're doing. Give the student a copy of the score sheet and most of them will keep track of the number of points they have.

6. Give each student an official tally of the number of points at least once a week.

   Your students want to know where they stand as far as grades go. By going over the grades with your students, you also have an opportunity to talk with each student individually. Sometimes this is hard to do in a busy day.

7. Make the students take responsibility.

Enrolling in the Lab is the first step for many of the students toward successful employment in Business Offices. The employers today want responsible workers who care about the quality of work that they do. Stress the importance of the rules of the classroom and why you must have rules. While a quarter may seem like a long time to both the student and you, you'll find that it will go very fast. The student must be aware that you expect him to be working the entire class period everyday because that's what they'll expect them to do in the office. Stress that work stations must be clean when they leave them and ready for the next class. You won't have time to do all this checking for them, so they'd better be willing to do some of it on their own.

8. You'll find that you grade too many papers at first.

Because of the fact that you teach in an individualized setting, most of you will have the tendency to grade too many papers. Because students are working independently I feel that I must keep a closer contact with their daily work. Consequently, you will find that there are "tons and tons" of paper to correct. You'll just have to make some justification to yourself on how many papers you're going to grade and how you'll handle things.

9. Have your students request the tests they need to take.

A prepared test request form is enclosed. When a student wants a test, they fill out the form and hand it in. They will receive the test at the beginning of the class period the next day. Set aside a special area where students may take tests. This separates those who are taking tests and allows you to monitor them easier.

10. Decide how to handle the student who completes all the work required early.

Some of your advanced students will become highly motivated under this type of a system, and will complete the work required early. You're going to have to develop some system for handling this type of student. Will you give credit, allow them to start another class, make them sit in the classroom? These are all things that you'd better be ready to face.

11. What about the student who just won't do anything in class?

Make a point of sitting down with these students as many times as you can during a class period. Each time you work with a student expect them to complete at least one problem during the time that you are working with them. By showing the interest and essentially forcing them to do at least a little bit each day, keep hoping that you're motivating them to do the required work. It doesn't always happen, but many times it does.

NAME ______________________________ Year of Graduation __________

BUSINESS DEPARTMENT MAJORS FOR PROFICIENCY CERTIFICATES

Courses to be taken for
SECRETARIAL MAJOR

Typewriting 1-2-3-4	0 0 0 0
Accounting 1-2 cr	0 0
Recordkeeping	0
Shorthand 1-2	0 0
Shorthand 3-4* or	0 0
Machine Transcription	0
Business Machines	0
Business Law*	0
Computer Orientation	0
Work Experience - 1 year*	0 0

Courses to be taken for
CLERICAL MAJOR

Typewriting 1-2-3	0 0 0
Accounting 1-2 or	0 0
Recordkeeping	0
Accounting 3-4*	0 0
Business Machines	0
Business Communications	0
Computer Orientation*	0
Business Law*	0
Work Experience - 1 year*	0 0

Courses to be taken for
ACCOUNTING MAJOR

Typewriting 1-2	0 0
Typewriting 3*	0
Accounting 1-2-3-4	0 0 0 0
Business Machines	0
Business Law	0
Computer Orientation	0
Business Communication*	0
Work Experience - 1 year*	0 0

Courses to be taken for
MANAGMENT MAJOR

Typewriting 1-2	0 0
Accounting 1-2 or	0 0
Recordkeeping	0
Business Law	0
Introduction to Marketing	0
Marketing	0
On-The-Job Training	0 0
Business Machines*	0
Computer Orientation	0
Business Communication*	0

0 = indicates number of semesters

* = indicates courses which are not required but which are strongly recommended

All grades in the Business Department must be completed with a C or better.

If a required course is not offered during your senior year, the requirement will be waived.

To be considered for Outstanding Business Student of the Year, you must complete the requirements for a proficiency certificate and maintain a 3.0 grade point average.

TYPING I

BASIC MINIMUM COMPETENCIES

Prerequisite: None

Credit: 1

Students will study the techniques of keyboarding by touch control; keyboarding with acceptable speed and accuracy; proofreading; making corrections; and preparing simple tables, letters, and one-page manuscripts in usable form.

Upon satisfactory completion of Basic Keyboarding, the student will be able to:

1. demonstrate touch control of the alphabetic keyboard.
2. demonstrate touch control of the numeric keyboard.
3. demonstrate the ability to operate the service keyboard.
4. demonstrate the use of correct keyboarding techniques:
    a. posture
    b. eyes on copy
    c. hand position
    d. stroking
    e. inserting and removing paper
5. follow written directions.
6. follow oral instructions.
7. demonstrate proper organization of the work station.
8. demonstrate safe working habits.
9. apply proofreading skills, including the recognition of misspelled words.
10. use reference materials, including:
    a. word-division manual
    b. dictionary
    c. telephone directory
    d. ZIP Code Directory
11. use appropriate error correction methods, including:
    a. correction paper
    b. correction fluid
    c. realignment
    d. squeezing
    e. spreading
    f. lift-off tape
12. show improvement in keyboarding speed on:
    a. straight copy
    b. rough-draft copy (backspace/strikeover technique)
    c. skill applications (production work)
13. demonstrate improved keyboarding on:
    a. straight copy
    b. skill applications (production work)

14. format information in usable form:
    a. letters
    b. envelopes
    c. simple business forms
    d. one-page manuscripts
    e. simple tables
    f. material on alternate sizes of paper
15. apply basic word-division rules.
16. space correctly before and after punctuation marks.
17. compose a rough-draft at the typewriter and produce a usable copy.
18. keyboard material in usable format from:
    a. unarranged material
    b. revised draft with proofreader's marks
    c. handwritten copy
    d. statistical copy
19. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    a. attendance
    b. punctuality
    c. good grooming
    d. dependability
    e. honesty
    f. ability to handle criticism
    g. ability to handle rumors & gossip
    h. commitment to the job
    i. handling stress
    j. discretely handling confidential information
    k. maintaining an organized work area
    l. exercising care in handling papers and using machines
    m. working in a team
    n. ethics
20. display growth and development in positive personal characteristics, including:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. fairness in dealing with others
    e. handling work with interruptions
    f. initiative
    g. loyalty
    h. self-starter
    i. open-mindedness
    j. positive reinforcement
    k. positive thinking
    l. time management
    m. economical use of materials and supplies
    n. self-confidence
    o. sense of humor
    p. tactfulness
    q. verbal, non-verbal expression
    r. keeping informed of employer's growth, needs and deadlines
21. demonstrate safe working habits, such as exercising care in:
    a. operating business machines.
    b. using equipment - stapler, file cabinet, chair, typewriter
    c. maintaining an organized work area.
    d. handling electrical cords, etc.

22. demonstrate leadership abilities in work situations, including:
    a. independent problem-solving ability.
    b. independent decision-making ability.
    c. ability to plan, coordinate and implement plans requiring teamwork.
    d. critiquing work of others and offering suggestions for improvement.
    e. ability to lead group activities.
    f. ability to delegate tasks and responsibilities.
    g. ability to prioritize tasks.
23. identify careers using keyboarding and describe application of keyboarding skills to the career.

Optional Competencies:

Student will be able to:

1. demonstrate "guesstimating" ability in formating material.
2. keyboard footnotes accurately.
3. format and keyboard multiple-page manuscripts.

Learner Outcomes:

1. Given oral instructions for completing an assignment, the student will be able to complete the task as assigned.
2. Given a problem involving 10 end-of-line word division decisions, the student will be able to refer to the correct reference source to verify that all word division decisions are correct.
3. The student will demonstrate initiative by being ready to go to work when a class begins and to continue to work at assigned tasks or, when assigned tasks are completed, will work on practice material where he/she knows improvement is needed.

BASIC MINIMUM COMPETENCIES

Prerequisite: Typing I, first semester
Credit: 1
Satisfies: 1 vocational credit

Students will keyboard with acceptable speed and accuracy; proofread; make corrections; and properly format in usable form: letters, envelopes, memos, manuscripts, and business forms.

Upon completion of Intermediate Keyboarding, the student will demonstrate ability to meet competencies for Basic Keyboarding and will be able to:

1. demonstrate improvement in speed in keyboarding:
    - a. straight (arranged paragraph) copy
    - b. rough-draft copy (backspace/strikeover technique)
    - c. skill applications (production work) involving more complex problems
2. demonstrate improved accuracy rates in keyboarding ability on:
    - a. straight (arranged paragraph) copy
    - b. skill applications (production work).
3. format and keyboard in usable form:
    - a. letters:
        - (1) copies
        - (2) two-page
    - b. envelopes
    - c. memos
    - d. forms:
        - (1) purchase order
        - (2) invoices
    - e. material on alternate sizes of paper
4. format and keyboard in usable form a multiple-page manuscript including:
    - a. footnotes
    - b. outlines
    - c. title page
    - d. table of contents
    - e. bibliography
5. compose a resume in rough-draft at the typewriter and produce in usable form.
6. keyboard with increased skill in usable form from:
    - a. unarranged material
    - b. revised draft with proofreader's marks
    - c. handwritten copy
    - d. statistical copy
7. demonstrate ability to properly care for typewriter, including:
    - a. cleaning the machine
    - b. changing the ribbon
8. identify careers utilizing keyboarding skills and describe application of keyboarding skills to the career.
9. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    - a. attendance
    - b. punctuality
    - c. good grooming
    - d. honesty
    - e. dependability
    - f. ability to handle criticism
    - g. ability to handle rumors & gossip
    - h. commitment to the job
    - i. handling stress
    - j. discretely handling confidential information
    - k. maintaining an organized work area
    - l. exercising care in handling papers and using machines
    - m. working in a team
    - n. ethics

10. display growth and development in positive personal characteristics, including:
    - a. cooperation
    - b. creativity
    - c. enthusiasm
    - d. fairness in dealing with others
    - e. handling work with interruptions
    - f. initiative
    - g. loyalty
    - h. self-starter
    - i. open-mindedness
    - j. positive reinforcement
    - k. positive thinking
    - l. time management
    - m. economical use of materials and supplies
    - n. self-confidence
    - o. sense of humor
    - p. tactfulness
    - q. verbal, non-verbal expression
    - r. keeping informed of employer's growth, needs and deadlines
11. demonstrate safe working habits, such as exercising care in:
    - a. operating business machines.
    - b. using equipment - stapler, file cabinet, chair, typewriter
    - c. maintaining an organized work area
    - d. handling electrical cords, etc.
12. demonstrate leadership abilities in work situations, including:
    - a. independent problem-solving ability.
    - b. independent decision-making ability.
    - c. ability to plan, coordinate and implement plans requiring teamwork.
    - d. critiquing work of others and offering suggestions for improvement.
    - e. ability to lead group activities
    - f. ability to delegate tasks and responsibilities.
    - g. ability to prioritize tasks.

Optional Competency:

Apply metric applications to keyboarding problems.

Learner Outcomes:

1. While keyboarding and being observed for ten minutes, the student will be able to demonstrate correct keyboarding techniques including posture, eyes on copy, hand position, stroking, and inserting and removing paper from the machine.
2. Given a document with a variety of punctuation usages, the student will within a 5-minute time period be able to keyboard material, spacing correctly before and after punctuation marks.

The first 6 weeks of Typing I or Beginning Typing, will be teacher-directed, after which time the following individualized curriculum will be instituted.

These assignments should be done with as few errors as possible. Unless otherwise specified, type each assignment once.

1st QUARTER

Week 7
30A, page 51 - for 10 minutes at the beginning of each class period
30E, page 52 }
33E, page 56 } - each line 3 times
Review - 33E, page 56 }
32C, page 55 } - each line 3 times
31C, page 53 }
Review - 30D, page 52 }
29C, page 50 }
28C, page 49 } - each line 3 times
27E, page 48 }

Week 8
35A, page 58 - for 10 minutes at the beginning of each class period
35E, page 59 }
36E, page 61 } - learn the proofreader's marks - type as directed
Timing - 37C, page 62 (have the instructor give you a colored sheet of typing paper* and give you three 3-minute timings - hand them in immediately)
Page 63 - each line twice

* Use colored typing paper each time you need a timing from now on.

Week 9
38A, page 64 - for 10 minutes at the beginning of each class period
Review - 31C, page 53 }
32C, page 55 } - each line 3 times
33E, page 56 }
40B, page 67 - Horizontal Centering
42C, page 70 - Vertical Centering
43D, page 72 - Guides for Word Division

2nd QUARTER

Week 1
45A, page 74 - for 10 minutes at the beginning of each class period
44C, page 73 - Word Division (you will need a Word Division book to complete this assignment)
45C, page 75, Problems 1 & 2 - Tabulations
46C, page 76, Problems 1 & 2 - Tabulations
Timings - 44D, page 74 - notify teacher when ready - three 3-minute writes

Week 2
47A, page 77 - for 10 minutes at the beginning of each class period
47E, page 78 - Tabulations
Timings - 51C, page 83 - two 5-minute writes - notify teacher when ready
49D, page 81, Problems 1, 2, & 3 - Tabulations
48E, page 80, Problem 1 only - Tabulation

Week 3
51A, page 83 - for 10 minutes at the beginning of each class period
51D, page 84, Problems 1, 2, & 3 - Tabulation
53C, page 86, Problems 1 & 2 - Memorandums
54B, page 87, Problem 1 - Memorandum
55D, page 89, Problems 1 & 2 - Personal notes

Week 4
57A, page 90 - for 10 minutes at the beginning of each class period
57C, page 91, Problems 1, 2, & 3 - Letters, modified block
Read 59C, page 93
59D, page 93, Problems 1 & 3 - Letters, modified block
60C, page 95, Problems 1 & 2 - Letters, modified block
Timings - 63B, page 98 - two 5-minute writes - notify teacher when ready

Week 5
61A, page 96 - for 10 minutes at the beginning of each class period
61B, page 96 - Small envelopes
61C, page 97, Problems 1 & 2 - Letters, modified block
63C, page 98-99, Problem 1 - Post card
Problem 2 - Personal note
Problem 3 - Personal letter
Problem 4 - business letter

2nd QUARTER (cont.)

Week 6
64A, page 100 - for 10 minutes at the beginning of each class period
66C, page 102, Problem 1 - Outlines
page 103, Problem 2 - Unbound manuscript
Timings - 65B, page 101 - two 5-minute writes - notify teacher when ready
67C, page 104 - Manuscript of Report
68C, page 105 - Page gauge
68D, page 106 - Report Manuscript

Week 7
69A, page 107 - for 10 minutes at the beginning of each class period
69C, page 107 - Footnotes
69D, page 108 - Manuscript and footnotes
70C, page 109 - Rough-draft manuscript
71D, page 111 - Manuscript with side headings

Week 8
73A, page 113 - for 10 minutes at the beginning of each class period
73D, page 114, Problem 1 - Centering tables
Problem 2 - Tabulation
Problem 3 - Tabulation
74C, page 115, Problem 1 - Personal note
Problem 2 - Personal letter
Timings - 73C, page 113 - two 5-minute writes - notify teacher when ready

Week 9
74A, page 114 - for 10 minutes at the beginning of each class period
74C, page 115, Problem 3 - Business letter
75B, page 116, Problem 1 - Outline
Problem 2 - Unbound manuscript
76D, page 118 - Number guides
77C, page 119 - Number guides
78D, page 121 - Number guides

3rd QUARTER

Week 1
79A, page 121 - for 10 minutes at the beginning of each class period
79D, page 122 - Capitalization guides
80C, page 123 - " "
81E, page 125 - " "
82C, page 126 - " "
83D, page 128 - Punctuation guides
84C, page 129 - " "
85D, page 131 - " "
86C, page 132 - " "
87D, page 134 - " "
88C, page 135 - " "
89D, page 137 - " "
90C, page 138 - " "
92C, page 141 - " "

Week 2
94A, page 144 - for 10 minutes at the beginning of each class period
94B, page 145 - Manuscript
95C, page 146-148, Problem 1 - Modified block letter
Problem 2 - Modified block letter
97C, page 150, Problem 1 - Letter
Problem 2 - Letter
Problem 4 - Letter
(Problem 3 is not assigned)

Week 3
98A, page 151 - for 10 minutes at the beginning of each class period
98C, page 151, Problem 1 - Letter
Problem 2 - Letter
Timing - 99D, page 153 - two 5-minute writes - notify teacher when ready
101C, page 155-156, Problem 1 - Letter
Problem 2 - Make corrections
Problem 3 - Retype
102C, page 157 - Letter

Week 4
103A, page 158 - for 10 minutes at the beginning of each class period
103C, page 159, Problem 1 - Letter
Problem 2 - Letter
Problem 3 - Theme form
104C, page 160, Problem 1 - Letter
page 161, Problem 2 - Letter
Problem 3 - Letter

3rd QUARTER (Cont.)

Week 5
106A, page 162 - for 10 minutes at the beginning of each class period
106C, page 162-163 - Manuscript
107C, page 164, Problem 1 - Table
Problem 3 - Table
108B, page 165 - Read the instructions and practice the examples 3 times each
108C, page 166, Problem 1 - Table
Timings - 109B, page 167 - two 5-minute writes - notify teacher when ready

Week 6
109A, page 167 - for 10 minutes at the beginning of each class period
109C, page 168, Problem 1 - Table
Problem 3 - Table
Problem 4 - Table
110C, page 169 - Table - this is not timed
111C, page 170 - Table

Week 7
112A, page 171 - for 10 minutes at the beginning of each class period
112D, page 171, Problem 1 - Table
Problem 2 - Table
113C, page 173, Problem 1 - Boxed table
Problem 2 - Boxed table
Timings - 114B, page 174 - two 5-minute writes, notify teacher when ready
115C, page 176-177 - Table

Week 8
116A, page 178 - for 10 minutes at the beginning of each class period
116C, page 179-180 - Manuscript
117C, page 180-182 - Unbound manuscript
118D, page 183 - Manuscript with footnotes

Week 9
119A, page 183 - for 10 minutes at the beginning of each class period
119C, page 184-188 - Manuscript

4th QUARTER

Week 1
121A, page 188 - for 10 minutes at the beginning of each class period
123C, page 189, Problem 1 - Bibliography
Problem 2 - Title page
Timings - 124B, page 190 - two 5-minute writes, notify teacher when ready
124C, page 190-191, Problem 1 - Letter
Problem 2 - Letter
Problem 3 - Letter
Problem 4 - Letter

Week 2
125A, page 192 - for 10 minutes at the beginning of each class period
125C, page 193 - Table
126F, page 196, Problem 1 - Alertness training
page 197, Problem 2 - Squeezing letters
page 197, Problem 3 - Centering on lines
page 198, Problem 4 - Fill-ins
page 198, Problem 5 - Post cards
page 198, Problem 6 - Mailing list

Week 3
125A, page 192 - for 10 minutes at the beginning of each class period
Read page 199
126F, page 199, Problem 7 - Addressing large envelopes
page 200, Problem 8 - Addressing small envelopes
" Problem 9 - Interoffice memo
" Problem 10 - " "
page 201, Problem 11 - Invoice

Week 4
125A, page 192 - for 10 minutes at the beginning of each class period
126F, page 201, Problem 12 - Invoice
page 202, Problem 13 - Voucher Check
" , Problem 14 - " "
" , Problem 15 - Justifying margin
page 203, Problem 16 - Attention and subject lines

4th QUARTER (Cont.)

Week 5	Snow Country Practice Set - warm up for 10 minutes on a conditioning practice from the book Job 1 - Application Job 2 - Letter Job 3 - Memorandum Job 4 - Letter Job 5 - Itinerary
Week 6	(Warm-up same as Week 5) Job 6 - Manuscript Job 7 - Letter Job 8 - Letter Job 9 - Memo Job 10 - Letter
Week 7	(Warm-up same as Week 5) Job 11 - Resolution Job 12 - Price list Job 13 - Pricing table Job 14 - Invoices
Week 8	(Warm-up same as Week 5) Job 15 - Computer change form Job 16 - Letters Job 17 - Voucher checks Job 18 - Profit-sharing plan
Week 9	(Warm-up same as Week 5) Job 19 - Travel expense report Job 20 - Reply - memorandum

FIRST QUARTER

		Total	Cumula.	Total Possible
Week 7 -	30E 33E	______	______	______
	33E 32C 31C	______	______	______
	30D 29C 28C 27E	______	______	______
Week 8 -	35E	______	______	______
	36E	______	______	______
	T.W. 37C	______	______	______
		______	______	______
		______	______	______
	Page 63	______	______	______
Week 9 -	31C 32C 33C	______	______	______
	40B	______	______	______
	42C	______	______	______
	43D	______	______	______

Name ____________________

SECOND QUARTER

		Total	Cumula.	Total Possible
Week 1 -	44C			
	45C, Problem 1			
	Problem 2			
	46C, Problem 1			
	Problem 2			
	T.W. 44D, page 74			
Week 2 -	47E			
	48E, Problem 1			
	49D, Problem 1			
	Problem 2			
	Problem 3			
	T.W. 51C, page 83			
Week 3 -	51D, Problem 1			
	Problem 2			
	Problem 3			
	53C, Problem 1			
	Problem 2			
	54B, Problem 1			
	55D, Problem 1			
	Problem 2			
Week 4 -	57C, Problem 1			
	Problem 2			
	Problem 3			
	59D, Problem 1			
	Problem 3			
	60C, Problem 1			
	Problem 2			
	T.W. 63B, page 98			

Typing I
2nd QUARTER

Name ______________________

		Total	Cumula.	Total Possible
Week 5 -	61B	_____	_____	_______
	61C, Problem 1	_____	_____	_______
	Problem 2	_____	_____	_______
	63C, Problem 1	_____	_____	_______
	Problem 2	_____	_____	_______
	Problem 3	_____	_____	_______
	Problem 4	_____	_____	_______
Week 6 -	66C, Problem 1	_____	_____	_______
	Problem 2	_____	_____	_______
	T.W. 65B, page 101	_____	_____	_______
		_____	_____	_______
	67C	_____	_____	_______
	68C	_____	_____	_______
	68D	_____	_____	_______
Week 7 -	69C	_____	_____	_______
	69D	_____	_____	_______
	70C	_____	_____	_______
	71D	_____	_____	_______
Week 8 -	73D, Problem 1	_____	_____	_______
	Problem 2	_____	_____	_______
	Problem 3	_____	_____	_______
	74C, Problem 1	_____	_____	_______
	Problem 2	_____	_____	_______
	T.W. 73C, page 113	_____	_____	_______
		_____	_____	_______
Week 9 -	74C, Problem 3	_____	_____	_______
	75B, Problem 1	_____	_____	_______
	Problem 2	_____	_____	_______
	76D	_____	_____	_______
	77C	_____	_____	_______
	78D	_____	_____	_______

Typing I Name ______________________ 19

THIRD QUARTER

		Total	Cumula.	Total Possible
Week 1 -	79D			
	80C			
	81E			
	82C			
	83D			
	85D			
	86C			
	87D			
	88C			
	89D			
	90C			
	92C			
Week 2 -	94B			
	95C, Problem 1			
	Problem 2			
	97C, Problem 1			
	Problem 2			
	Problem 4			
Week 3 -	98C, Problem 1			
	Problem 2			
	T.W. 99D, page 153			
	101C, Problem 1			
	Problem 2			
	Problem 3			
	102C			
Week 4 -	103C, Problem 1			
	Problem 2			
	Problem 3			
	104C, Problem 1			
	Problem 2			
	Problem 3			

Typing I
3rd QUARTER
Page 2

Name ______________________

		Total	Cumula.	Total Possible
Week 5 -	106C			
	107 , Problem 1			
	Problem 3			
	108C, Problem 1			
	T.W. 109B, page 167			
Week 6 -	109C, Problem 1			
	Problem 3			
	Problem 4			
	110C			
	111C			
Week 7 -	112D, Problem 1			
	Problem 2			
	113C, Problem 1			
	Problem 2			
	T.W. 114C, page 174			
	115C			
Week 8 -	116C			
	117C			
	118D			
Week 9 -	119C			

Typing I

Name ____________________

FOURTH QUARTER

		Total	Cumula.	Total Possible
Week 1 -	123C, Problem 1			
	Problem 2			
	T.W. 124B, page 190			
	124C, Problem 1			
	Problem 2			
	Problem 3			
	Problem 4			
Week 2 -	125C			
	126F, Problem 1			
	Problem 2			
	Problem 3			
	Problem 4			
	Problem 5			
	Problem 6			
Week 3 -	126F, Problem 7			
	Problem 8			
	Problem 9			
	Problem 10			
	Problem 11			
Week 4 -	126F, Problem 12			
	Problem 13			
	Problem 14			
	Problem 15			
	Problem 16			
Week 5 -	Job 1			
	Job 2			
	Job 3			
	Job 4			
	Job 5			

Typing I
4th QUARTER
Page 2.

Name ______________________

		Total	Cumula.	Total Possible
Week 6 -	Job 6			
	Job 7			
	Job 8			
	Job 9			
	Job 10			
Week 7 -	Job 11			
	Job 12			
	Job 13			
	Job 14			
Week 8 -	Job 15			
	Job 16			
	Job 17			
	Job 18			
Week 9 -	Job 19			
	Job 20			

ADVANCED AND PRODUCTION TYPING

BASIC MINIMUM COMPETENCIES

Prerequisite: Typing I, second semester

Credit: 2

Satisfies: 2 vocational credits

Student will keyboard with acceptable speed and accuracy; proofread, make corrections; properly format in usable form: letters, envelopes, business forms, manuscripts, application blanks, tables; and produce copy for multiple-page reprographics.

Upon satisfactory completion of Typing II (second semester), the student will be able to demonstrate the competencies for Typing II, (first semester) and will be able to:

1. demonstrate improved speed in keyboarding:
   a. straight (arranged paragraph) copy
   b. unarranged paragraph copy
   c. rough-draft copy (backspace/strikeover technique)
   d. skill applications (production work) involving more complex tasks.
2. demonstrate increased accuracy in keyboarding:
   a. straight (arranged paragraph) copy
   b. unarranged paragraph copy
   c. skill applications (production work) involving tasks at increased difficulty levels
3. format in usable form:
   a. letters
      (1) copies
      (2) two-page letter
      (3) with tables
      (4) form letters
      (5) special lines
      (6) standard paragraphs
   b. envelopes
   c. business forms
   d. material on alternate sizes of paper
   e. two-page manuscript
   f. business reports
   g. statistical reports
   h. tables
   i. reprographic masters
      (1) stencil
      (2) spirit
      (3) others (depending upon equipment available)
4. compose a rough-draft at the typewriter and produce in usable copy:
   a. application letter
   b. minutes of meetings
5. keyboard with increased proficiency in usable form from:
   a. unarranged material
   b. revised draft with proofreader's marks
   c. handwritten copy
   d. statistical copy

6. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    a. attendance
    b. punctuality
    c. good grooming
    d. honesty
    e. dependability
    f. ability to handle criticism
    g. ability to handle rumors & gossip
    h. commitment to the job
    i. handling stress
    j. discretely handling confidential information
    k. maintaining an organized work area
    l. exercising care in handling papers and using machines
    m. working in a team
    n. ethics
7. display growth and development in positive personal characteristics, including:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. fairness in dealing with others
    e. handling work with interruptions
    f. initiative
    g. loyalty
    h. self-starter
    i. open-mindedness
    j. positive reinforcement
    k. positive thinking
    l. time management
    m. economical use of materials and supplies
    n. self-confidence
    o. sense of humor
    p. tactfulness
    q. verbal, non-verbal expression
    r. keeping informed of employer's growth, needs and deadlines
8. demonstrate the ability to center copy
    a. mathematically
    b. visually
9. explain the concept of word processing (and demonstrate ability to apply concepts if equipment is available).
    a. power typing
    b. machine transcription
10. identify use of basic paper supplies used in an office, including:
    a. bond
    b. onionskin
    c. second sheet
    d. carbon paper
    e. weights of paper
    f. paper sizes
    g. reprographic paper
11. identify careers using keyboarding skills and power keyboarding skills.
12. demonstrate safe working habits, such as exercising care in:
    a. operating business machines.
    b. using equipment - stapler, file cabinet, chair, typewriter
    c. maintaining an organized work area
    d. handling electrical cords, etc.
13. demonstrate leadership abilities in work situations, including:
    a. independent problem-solving ability
    b. independent decision-making ability
    c. ability to plan, coordinate, and implement plans requiring teamwork
    d. critiquing work of others and offering suggestions for improvement.
    e. ability to lead group activities

13. Continued:
    f. ability to delegate tasks and responsibilities
    g. ability to prioritize tasks

Learner Outcomes:

1. Given a set of written directions, the student will be able to follow those directions and correctly keyboard the assigned task within a specified period of time.
2. Given a written exam, the student, within a specified period of time, will be able to identify negative and positive work habits and traits in a business office situation.

ADVANCED TYPING

COURSE INTRODUCTION

Objectives: After satisfactorily completing the course, the student will be able to:

1. identify the location, name, and function of the following parts of the typewriter:
    - a. carriage
    - b. carriage release
    - c. carriage return
    - d. platen
    - e. platen knob
    - f. paper release lever
    - g. paper guide
    - h. paper table
    - i. paper bail
    - j. line-space regulator
    - k. variable line-space regulator
    - l. ratchet release
    - m. margin set
    - n. keyboard
    - o. space bar
    - p. ribbon control
2. demonstrate touch control of the typewriter:
    - a. letters
    - b. numbers
3. demonstrate proper typing techniques, such as:
    - a. posture
    - b. eyes on copy
    - c. hand position
    - d. stroking
    - e. inserting and removing paper
4. demonstrate safe working habits, such as:
    - a. operating typewriter, including centering carriage when leaving.
    - b. avoiding the hazards of loose clothing, jewelry, and long hair.
    - c. maintaining an organized work area.
5. apply proofreading skills, including the recognition of misspelled words.
6. demonstrate proper error correction methods, including:
    - a. erasing
    - b. correction paper
    - c. realignment
    - d. squeezing
    - e. spreading
    - f. correction fluid
    - g. correction tape
    - h. self-correcting typewriter
7. show improvement in typing speed on:
    - a. straight copy.
    - b. production work.
8. show improvement in typing accuracy on:
    - a. straight copy.
    - b. production work.
9. center copy vertically:
    - a. mathematically.
    - b. visually.
10. center copy horizontally:
    - a. mathematically.
    - b. visually.
11. arrange and type data in table form:
    - a. multiple columns
    - b. columnar headings
    - c. boxed
    - d. various paper sizes

Objectives: Continued

12. follow written directions.
13. follow oral instructions.
14. type the following in acceptable form:
    - a. personal letters
    - b. business letters (block, modified block and simplified)
        - (1) copies
        - (2) envelopes
        - (3) two-page
        - (4) with tables
        - (5) form letters
        - (6) special-size stationery
        - (7) special features
    - c. memos
    - d. reports
        - (1) manuscripts with footnotes
        - (2) statistical
    - e. forms
        - (1) purchase orders and requisitions
        - (2) invoices
        - (3) bills of lading
        - (4) applications
    - f. reprographic masters
        - (1) stencils
        - (2) spirit masters
        - (3) others as available
    - g. personal data sheet
15. use reference materials in applying the rules of word division.
16. compose at the typewriter
    - a. inquiry letter
    - b. acknowledgement letter
    - c. application letter
17. type from:
    - a. rough draft
    - b. handwritten copy
    - c. number copy
    - d. dictation
18. demonstrate techniques of typewriter care:
    - a. cleaning
    - b. changing ribbon
    - c. what to do in case of equipment failure
19. understand the consequences of positive and negative work habits and traits in a business office, such as:
    - a. attendance
    - b. punctuality
    - c. grooming
    - d. dependability
    - e. honesty
    - f. working in a team
    - g. handling criticism
    - h. handling stress
    - i. discretion in handling confidential information
    - j. maintaining an organized work area
    - k. care in handling papers and using machines
    - l. time management

Objectives: Continued

20. recognize the importance of leadership skills, such as:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. fairness
    e. handling work with interruptions
    f. independent decision making
    g. initiative
    h. loyalty
    i. positive thinking
    j. prioritization
    k. problem-solving
    l. self-confidence
    m. sense of humor
    n. tactfulness
21. demonstrate an awareness of the concept of work processing:
    a. power typing.
    b. machine transcribing.
22. demonstrate an awareness of careers utilizing typing.

Materials Needed:

Typewriting: A Mastery Approach, Advanced Course for IBM Selectric Typewriters, Mitchell, Mach, LaBarre (Main Text)

Typewriting Drills for Speed and Accuracy, 4th Edition, Rowe-Etier

Typing Power Drills, 2nd Edition, Lloyd, Rowe, Winger

Introduction to Machine Transcription, DDC Rosen, Kmech

Grading:

Letter and/or numerical grades for each unit will be included in the LAP for each unit. You are encouraged to keep an up-to-date record of the grades you earn for your work completed.

HYPHENATION

Although variations in hyphenation are considerable, there are several rules which will help determine whether or not to use the hyphen. Realizing, of course, that there are exceptions to most rules, use the following list as a basic guide:

1. Compound numbers from twenty-one to ninety-nine are hyphenated.
2. When numerals are used before other words to form a compound adjective, a hyphen is needed.
3. If a compound adjective precedes a noun it modifies, it is hyphenated; however, when it follows the noun, no hyphen is needed.
4. In compounds containing a prepositional phrase, a hyphen is generally needed.
5. After a prefix that goes before a proper noun, use a hyphen.
6. When describing generations or descent, use a hyphen after great.
7. Use a hyphen in a compound adjective consisting of a fraction.

It is equally important to know when hyphens are not used. As a general rule, hyphens are omitted in most civil and military titles. A combination of an adverb ending in ly and an adjective is not hyphenated. Do not hyphenate modifying foreign phrases or chemical and scientific terms.

Hyphenation is an area where utmost caution should be exercised. Whenever you have the slightest doubt, use the style shown in an up-to-date dictionary.

INDIVIDUAL PROGRESS

Unit	Starting Date	Finishing Date	Course Completion		Unit Grade
Word Division - Rules					
Memorandums				4%	
Envelopes				8%	
Special Letter Parts				12%	
Preparation of Copies				16%	
Two-Page Letter				20%	
Correspondence				30%	
Tables				40%	
Integrated Project Module				50%	
Educational Manuscript				60%	
Business Report				70%	
In-Basket Project				80%	
Job Campaign Module				90%	
Intro. Machine Transcription				100%	

Name ____________

9 10 11 12 Completion Date ____________

Grade ____________

WORD DIVISION GUIDE

1. A word of one syllable or less than six letters should not be divided.

   (through - one syllable) (abase - less than six letters)

2. Do not divide an abbreviation. (not: FS/LIC)

3. Always have more than one letter with the first part of the word and more than two in the last word part.

   (not: i/mplicit) (not: lethar/gy)

4. Never divide a contraction. (not: should/n't)

5. A hyphenated compound word should be divided only at the hyphen. (not: self-evalu/ation)

6. Avoid dividing a word where mispronounciation might be caused.

   (not: read/just)

7. The last word on a page or in a paragraph should not be divided.

8. A compound word without a hyphen should be divided only between the elements of the compound.

   (not: busi/nesswoman) (but: business/woman)

9. Divide between the two consonants if the final consonant, preceded by a single vowel, is doubled before the suffix is added.

   (not: compell/ing) (but: repress/ion)

10. Whenever possible, avoid dividing dates, foreign words, proper names, figures, signs representing words, and degrees.

11. Avoid dividing words at the end of two or more consecutive lines.

12. Never separate a two-letter syllable at the end of a word.

Advanced Typing

Pages 266-288

Name ____________________

Period ____________________

Date Started ____________

Date Completed ____________

Grade ____________

INTEGRATED PROJECTS MODULE

Objectives: The student will be able to:

1. have the opportunity to apply production typewriting compentencies in a structured job setting.
2. choose one of three firms and type the tasks assigned in that module.
3. refine his/her proofreading and grammar skills.
4. submit for grading only "Mailable" copies.

Materials Needed:

1. Plain and/or letterhead paper
2. Correction material
3. Envelopes
4. Forms - Job Description (page 284, #13)
    - Objectives (page 287, #14)

Maximum Time Allowed:

7 days

Procedures:

1. Scan the three Integrated Projects found on pages 266 - 303.
2. Determine the project you want to type after consulting the grading scale.
3. Ask the instructor for the grading sheet for your specific project.
4. Type each task in "Mailable" form.
5. As you finish typing a task in mailable form, paper clip it to the grading sheet and submit the task to your instructor for grading.
6. When the task is determined to be mailable, that date will be recorded on the grading sheet.
7. On the due date you will resubmit all tasks stapled together in proper order with the grading sheet on top and this sheet as the last page.

Grading:

"Mailable Form" - typed with no typographical errors, acceptable corrections, and acceptable style.

All tasks completed in Mailable Form, the final grade for the project will be:

C	Consulting Firm
B	Government
A	Manufacturing Co.

Advanced Typing
INTEGRATED PROJECTS
Pages 288 - 303

Name ____________________
Period ____________________
Date Started ______________
Date Completed ______________
Grade ______________

GOVERNMENT

Task No.	Date Submitted	Mailable Date
1		
2		
3		
4		
5		
6		
7		
8		
9		

All tasks completed in Mailable Form - FINAL GRADE B

Advanced Typing
Pages 305-311

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

NORTHERN STATES POWER

Directions:

1. Type each task correctly - type your name, task number and page number on the back of your paper.
2. Submit each completed task as you finish typing it with this paper clipped to the task.
3. Possible points will be recorded on this grading sheet and returned to you.
4. On the due date you will resubmit all tasks stapled in priority order with this sheet as the first page.

Grading:

Minus two for every error not corrected.

Major Errors	Grade	Grading Scale - including minor errors
0	A	4.0 - 3.6
1	B	3.5 - 2.6
2	C	2.5 - 1.6
3	D	1.5 - .6
4+	F	.5 - 0

Item Number	Job Description (Complete)	Points Earned
Priority List	Calendar	______
1	______________	______
2	______________	______
3	______________	______
4	______________	______
4a	______________	______
5	______________	______
6	______________	______
7	______________	______
8	______________	______
	TOTAL POINTS	______
	÷ 9	______
	LETTER GRADE	______

Advanced Typing

Name ____________________
Period ____________________
Date Started ______________
Date Completed ______________
Grade ______________

BUSINESS REPORT UNIT

Objectives: The student will be able to:

1. type in correct form a business report according to the forms shown on pages 150-154.
2. correctly format a table of contents, title page and list of exhibits.
3. use proper spacing, margins and indentations for a business report.
4. properly place major headings, side headings and titles.
5. design and type exhibits and displays in a way that is clear and easy to interpret and understand.
6. identify common errors and correct.
7. type and/or draw attractive, effective exhibits and/or displays.
8. type proper footnotes within a sentence.

Materials Needed:

1. Plain typing paper
2. Correction material
3. Ruler
4. Black and colored pens or pencils for exhibits and displays (optional)

Maximum Time Allowed:

7 days

Procedures:

1. Read the section in the text on business reports (pages 144-148).
2. Type task 1 on page 155-156 using the form illustrated on page 149. Remember the proper heading on the second page.
3. Submit completed memorandum to instructor for grading.
4. Type task 2 on page 156-158 (reference page 149).
    a. Displays - read explanation on page 144 and study examples on pages 145-148. Notice the different type of displays.
    b. Displays should be either horizontal or vertical bar graphs. See page 146. Be creative!
    c. Try to combine displays.

4. Continued
    - d. Create appropriate titles for each display.
    - e. Check for spelling errors and typo's.
    - f. Don't forget the headings on each page.
5. Submit to the instructor for grading.
6. Type task 5 - preparing a long business report as illustrated on pages 150-154. It will be a leftbound report.
    - a. On the first page, center headings. (Center of paper of a leftbound report is 54.)
    - b. Correct all errors.
    - c. Footnotes are listed on page 172. They are to be typed in parentheses following the sentence.

      Example: . . . next four decades (Ten-Year Forecasts).
    - d. Be consistent. There are no displays, only exhibits. If the word "display" is used, it should be changed to exhibit.
    - e. Review section on the preparation of displays and exhibits (pages 144-148) and use of exhibits on pages 153-154.
    - f. Use the typewriter as much as possible when preparing the exhibits.
    - g. Prepare a title page and table of contents as shown on page 150. Type in proper form. The report has been prepared by: R. Jones, J. Smith, C. Wilson. It will be distributed to: A. Allen, S. Simpson, R. Richards, L. Taylor. The center of report is 54.
7. Submit for grading.

Advanced Typing

Name ______________________

Period ______________________

Date Started ______________

Date Completed ____________

Grade ______________

FORMS UNIT

Objectives: The student will be able to:

1. type nearly on a line when completing a printed form.
2. properly use the line finder on the typewriter.
3. properly use the planten variable knob on the typewriter.
4. properly use the horizontal typing lines located on the cardholder on the typewriter.
5. look at a sample copy of six completed forms and type a task similar to each form.

Materials Needed:

Blank forms for the following:
- Purchase requisitions
- Travel itinerary
- Travel authorization
- Dental claim statement
- Requisition for personnel
- Payroll register

Maximum Time Allowed:

5 class periods

Procedures:

1. Read the introductory page to this unit on page 194 of your textbook.
2. Review sample of Purchase Requisition on page 195 and then type a requisition from Task 1, page 196. Submit each task for grading as soon as you have completed typing and proofing each task.
3. Review sample of a Travel Itinerary on page 202 and then type Task 11, page 203, on form provided.
4. Review sample of Travel Authorization on page 204 and then type Task 14, page 205.
5. Review sample of a Dental Claim Statement on page 209 and then type Task 20, page 205.
6. Review sample of a Requisition for Personnel on page 211 and then type Task 23, page 212.
7. Review sample of a Payroll Register on page 215 and then type Task 26 on page 215.

Grading:

1. Tasks typed in proper form.
2. Proper heading on back of each page.
3. All tasks submitted for grading within the allotted time.
4. All errors have been neatly corrected.
5. Uncorrected errors or messy corrections will lower your grade.
6. Each task is one-sixth of final unit grade.

PURCHASE REQUISITION

DATE ______________________

QUANTITY	DESCRIPTION	ESTIMATED COST
PURPOSE OR USE	TOTAL	

DEPT.	PROJECT	DATE REQUIRED	REQUIRED APPROVALS
REQUISITIONED BY			PRESIDENT
APPROVED BY			BUS. ADMIN.

PURCHASING DEPT. ONLY

DATE ORDERED ______________________

ORDER NUMBER ______________________

ORDERED FROM ______________________

PURCHASE REQUISITION

DATE ____________________

QUANTITY	DESCRIPTION	ESTIMATED COST
	TOTAL	

PURPOSE OR USE

DEPT.	PROJECT	DATE REQUIRED	REQUIRED APPROVALS
REQUISITIONED BY			PRESIDENT
APPROVED BY			BUS. ADMIN.

PURCHASING DEPT. ONLY

DATE ORDERED ____________________

ORDER NUMBER ____________________

ORDERED FROM ____________________

TRAVEL ITINERARY

NAME ____________________

DATE DEPARTURE	FLIGHT NUMBER	FROM	TO	TIME	
				DEPART	ARRIVAL
DATE RETURN					

HOTEL	CITY & STATE	PHONE NUMBER	DATES

COMPANY ADVANCE $

REASON ____________________

CAR ____________________

TRAVEL ITINERARY

NAME ______________________

DATE DEPARTURE	FLIGHT NUMBER	FROM	TO	TIME	
				DEPART	ARRIVAL
DATE RETURN					

HOTEL	CITY & STATE	PHONE NUMBER	DATES

COMPANY ADVANCE $

REASON ____

CAR ______________

TRAVEL AUTHORIZATION AND EXPENSE REPORT

1 NAME ______ DEPT. ______ DATE LEAVING ______ DATE RETURNING ______

2 DESTINATION ______ AIR ☐ RAIL ☐ CAR PERSONAL ☐ CAR RENTAL ☐

3 PROJECT ______

4 ARRANGE TRANSPORTATION YES ☐ NO ☐ | ARRANGE LODGING YES ☐ NO ☐ | APPROVED BY ______ | TRAVEL ADVANCE $ ______

5 LIST HOTELS IN ORDER OF DATES

1. ______ 3. ______

2. ______ 4. ______

[illegible]	TO [illegible]	AIRLINE [illegible]	[illegible]	[illegible]	[illegible]	[illegible]

6

No.	CASH EXPENDITURES		SUNDAY /	MONDAY /	TUESDAY /	WEDNESDAY /	THURSDAY /	FRIDAY /	SATURDAY /	ITEM TOTALS
1	TRANSPORTATION NOT CHARGED DIRECTLY TO COMPANY (ATTACH RECEIPTS)	AIR OR RAIL AUTO RENTAL								
2		MILEAGE COST								
3		TAXI BUS								
4	HOTEL (ATTACH RECEIPTS)									
5	MISC. EXPENSE (EXPLAIN)									
6	MEALS	BREAKFAST								
7		LUNCH								
8		DINNER								
9	MEETING EXPENSE (DETAIL BELOW)									TOTAL EXP.
10	DAILY TOTALS ▷									

7

ITEM NO. 1, 2 & 3	FROM TO	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
TRANSPORTATION NOT CHARGED TO THE COMPANY	FROM							
	TO							
	TO							

8

[illegible]	[illegible]	[illegible] AMOUNT	[illegible]	[illegible]
MEETING EXPENSE AND / OR ENTERTAINMENT EXPLAIN IN DETAIL				

9 SIGNED ______ APPROVED ______

ACCT.	DEPT.	AMOUNT	COMMISSION #	DATE

AIR TRAVEL ______

HOTEL ______

OTHER (SPECIFY) ______

CHARGE SLIPS MUST BE ATTACHED

CHECK NO. ______ DATE ______ AMOUNT ______

TOTAL EXP. ______

TOTAL ADVANCE ______

DIFFERENCE ______

AMT. RETURNED ______

AMOUNT OF CHECK ______

TRAVEL AUTHORIZATION AND EXPENSE REPORT

1 NAME ______ DEPT. ______ DATE LEAVING ______ DATE RETURNING ______

2 DESTINATION ______ AIR ☐ RAIL ☐ CAR PERSONAL ☐ CAR RENT

3 PROJECT ______

4 ARRANGE TRANSPORTATION YES ☐ NO ☐ | ARRANGE LODGING YES ☐ NO ☐ | APPROVED BY ______ | TRAVEL ADVANCE $ ______

5 LIST HOTELS IN ORDER OF DATES

1. ______
2. ______
3. ______
4. ______

DATE	[illegible] TO [illegible]	[illegible] AIRLINES [illegible]	[illegible]	[illegible]	[illegible]	[illegible]

6

No.	CASH EXPENDITURES		SUNDAY /	MONDAY /	TUESDAY /	WEDNESDAY /	THURSDAY /	FRIDAY /	SATURDAY /	ITEM TOTALS
1	TRANSPORTATION NOT CHARGED DIRECTLY TO COMPANY (ATTACH RECEIPT)	AIR OR RAIL AUTO RENTAL								
2		MILEAGE COST								
3		TAXI BUS								
4	HOTEL (ATTACH RECEIPTS)									
5	MISC. EXPENSE (EXPLAIN)									
6	MEALS	BREAKFAST								
7		LUNCH								
8		DINNER								
9	MEETING EXPENSE (DETAIL BELOW)									
10	DAILY TOTALS ▷									TOTAL EXP.

7

ITEM NO. 1, 2 & 3	FROM TO	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
TRANSPORTATION NOT CHARGED TO THE COMPANY	FROM							
	TO							
	TO							

8

[illegible]	[illegible]	[illegible] AMOUNT	[illegible]	[illegible]
MEETING EXPENSE AND / OR ENTERTAINMENT EXPLAIN IN DETAIL				

9 SIGNED ______ APPROVED ______

[illegible] FOR ACCOUNTING USE ONLY

ACCT	DEPT	AMOUNT	COMMISSION #	DATE

[illegible] NOT CHARGED DIRECTLY TO COMPANY

AIR TRAVEL ______

HOTEL ______

OTHER (SPECIFY) ______

CHARGE SLIPS MUST BE ATTACHED

CHECK NO. ______ DATE ______ AMOUNT ______

TOTALS

TOTAL EXPEN

TOTAL ADVANC

DIFFERENCE

AMT RETU

AMOUNT OF CHECK

STATEMENT OF CLAIM
FOR
GROUP DENTAL EXPENSE BENEFITS

POLICY NO. 54922

INSTRUCTIONS FOR MAKING CLAIM FOR BENEFITS

form is used to make claim for all dental expenses. It also serves as a TREATMENT PLAN, which is required for proposed FIXED DGEWORK and may be requested in connection with other dental services

COMPLETE EMPLOYEE'S STATEMENT. Please be sure to answer every question.

Complete "Authorization to Release Information" on the reverse side of this form.

f you wish payment made directly to the dentist, complete the "Authorization to Pay Dental Benefits" section on the reverse side of this form.

Have dentist complete his statement on back of this form.

The employee is responsible to see that:

1. Fees are discussed with the dentist before treatment begins.
2. Charges are submitted the earlier of:
   a. completion of dental treatment, if treatment is to be completed within 90 days; or
   b. every 90 days during continuing dental treatment
3. A "Treatment Plan" required in advance of fixed bridgework is to be submitted within 20 days from the examination which showed the need.
4. A new Treatment plan is submitted when there is a change of dentists.

MAIL COMPLETED CLAIM FORM TO →

[redacted]

[illegible]

CLAIM IS BEING MADE FOR:

☐ Self ☐ Unmarried child, if age 19 or over, benefits continued as ☐ Full time student, attending ______ School

☐ Wife Husband ☐ Other (Specify)

PATIENT'S NAME	DATE OF BIRTH	SEX
IS CLAIM DUE TO AN ACCIDENT?	IF 'YES', WHERE DID ACCIDENT OCCUR?	DATE OF ACCIDENT

DESCRIBE ACCIDENT:

IS THIS CLAIM THE RESULT OF A WORK RELATED ILLNESS OR INJURY? ☐ Yes ☐ No

ARE YOU (EMPLOYEE) MARRIED? ☐ Yes ☐ No IS YOUR WIFE HUSBAND EMPLOYED? ☐ Yes ☐ No

NAME

EMPLOYER

ADDRESS

5a IF CLAIM IS FOR A DEPENDENT CHILD, IS THIS CHILD EMPLOYED? ☐ Yes ☐ No

EMPLOYER

ADDRESS

IS PATIENT ALSO COVERED FOR ANY OTHER BENEFITS AS LISTED BELOW, EITHER AS AN EMPLOYEE OR DEPENDENT. ☐ Yes ☐ No

If Yes, check box below which applies and complete 6 a.

☐ Group benefits covering dental and oral surgical procedures of any kind including Blue Cross and Blue Shield.

☐ Coverage of dental care and oral surgical expenses provided by an employer, a union welfare plan, any federal, state, provincial or other governmental program.

☐ Other arrangement of dental and oral surgical benefits for individuals of a group.

6a GIVE NAME AND ADDRESS OF OTHER COMPANY OR ORGANIZATION PROVIDING BENEFITS:

NAME

ADDRESS

OTHER BENEFITS OR BLUE CROSS/BLUE SHIELD GROUP NO.(S)

EMPLOYER'S COMPANY'S NAME	EMPLOYER'S ADDRESS	
EMPLOYEE'S SIGNATURE	SOC. SEC. NO. / /	DATE

STREET NO. CITY STATE ZIP CODE

BEST COPY AVAILABLE

BEST COPY AVAILABLE

STATEMENT OF CLAIM
FOR
GROUP DENTAL EXPENSE BENEFITS

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3. A "Treatment Plan" required in advance of fixed bridgework is to be submitted within 20 days from the examination which showed the need.
4. A new Treatment plan is submitted when there is a change of dentists.

MAIL COMPLETED CLAIM FORM TO →

[illegible]

[illegible]

CLAIM IS BEING MADE FOR:

☐ Self ☐ Unmarried child of age 19 or over, benefits continued as ☐ Full time student, attending ______ School

☐ Wife Husband ☐ Other (Specify)

PATIENT'S NAME | DATE OF BIRTH | SEX

IS CLAIM DUE TO AN ACCIDENT? | IF "YES", WHERE DID ACCIDENT OCCUR? | DATE OF ACCIDENT

DESCRIBE ACCIDENT:

IS THIS CLAIM THE RESULT OF A WORK RELATED ILLNESS OR INJURY? ☐ Yes ☐ No

ARE YOU (EMPLOYEE) MARRIED? ☐ Yes ☐ No IS YOUR WIFE HUSBAND EMPLOYED? ☐ Yes ☐ No

NAME

EMPLOYER

ADDRESS

5a IF CLAIM IS FOR A DEPENDENT CHILD, IS THIS CHILD EMPLOYED? ☐ Yes ☐ No

EMPLOYER

ADDRESS

IS PATIENT ALSO COVERED FOR ANY OTHER BENEFITS AS LISTED BELOW, EITHER AS AN EMPLOYEE OR DEPENDENT. ☐ Yes ☐ No

If Yes, check box below which applies and complete 6a.

☐ Group benefits covering dental and oral surgical procedures of any kind including Blue Cross and Blue Shield.

☐ Coverage of dental care and oral surgical expenses provided by an employer, a union welfare plan, any federal, state, provincial or other governmental program.

☐ Other arrangement of dental and oral surgical benefits for individuals of a group.

6a GIVE NAME AND ADDRESS OF OTHER COMPANY OR ORGANIZATION PROVIDING BENEFITS:

NAME

ADDRESS

OTHER BENEFITS OR BLUE CROSS/BLUE SHIELD GROUP NO.(S)

EMPLOYER'S COMPANY'S NAME | EMPLOYER'S ADDRESS

EMPLOYEE'S SIGNATURE | SOC. SEC. NO. / / | DATE

STREET NO. | CITY | STATE | ZIP CODE

BEST COPY AVAILABLE

BEST COPY AVAILABLE

REQUISITION FOR PERSONNEL

Job Title ____________________ Level: ____________________

Department: ____________________ Cost Center: ____________________

Supervisor ____________________ Tel. Ext. ____________________

Date Needed ____________________ Month Budgeted ____________________

Over Budget ☐

For Human Resource Development use

Requisition No ____________

Received ____________

Posted ____________

Level ____________

Filled-Date ____________

Filled-By ____________

Start Date ____________

Salary ____________

Relocation Expense Budgeted: ☐ Yes ☐ No

Exempt ☐ Non-exempt ☐

This request is for:

☐ Net Addition ☐ New Position (Attach Job Description & Job Evaluation)

☐ Replacement For ____________________ (Name)

Reason ☐ Promoted ☐ Transfer ☐ Terminated ☐ Leave

To position ____________________ Department ____________________ Date ____________

☐ Full Time ☐ Part Time ☐ Temporary Hours ________ From ________ To ________

Duties & Responsibilities —Please be specific	% of Time
(Duties & Responsibilities will change within one year ☐ If so, attach explaination)	

Education and or Experience

Required

Desired

Requested & Approved By	Date
Supervisor	
Dept./Dist. Manager	
Vice President	
Human Resource Development	

REQUISITION FOR PERSONNEL

For Human Resource Development use

Requisition No ________
Received ________
Posted ________
Level ________
Filled-Date ________
Filled-By ________
Start Date ________
Salary ________

Job Title ____________________ Level: ____________________
Department: ____________________ Cost Center: ____________________
Supervisor ____________________ Tel. Ext. ____________________
Date Needed ____________________ Month Budgeted ____________________
Over Budget ☐

Relocation Expense Budgeted ☐ Yes ☐ No
Exempt ☐ Non-exempt ☐
This request is for:
☐ Net Addition ☐ New Position (Attach Job Description & Job Evaluation)
☐ Replacement For ____________________ (Name)
Reason ☐ Promoted ☐ Transfer ☐ Terminated ☐ Leave
To position ____________________ Department ____________ Date ________
☐ Full Time ☐ Part Time ☐ Temporary Hours ...... From .... To ....

Duties & Responsibilities —Please be specific	% of Time
(Duties & Responsibilities will change within one year ☐ If so, attach explaination)	

Education and or Experience

Required

Desired

Requested & Approved By	Date
Supervisor	
Dept./Dist. Manager	
Vice President	
Human Resource Development	

PAYROLL REGISTER

WEEK ENDING ______________________

DATE OF PAYMENT ______________________

NO.	NAME	EARNINGS			DEDUCTIONS						Tot. Deduct	Net Pay	Check No.
		Reg.	O.T.	Gross Pay	Federal Inc. Tax	State Inc. Tax	F.I.C.A.	Bonds	Ins.	Hosp.			
	TOTALS												

PAYROLL REGISTER

WEEK ENDING ______________________

DATE OF PAYMENT ______________________

NO.	NAME	EARNINGS			DEDUCTIONS						Tot. Deduct	Net Pay	Check No.
		Reg.	O.T.	Gross Pay	Federal Inc. Tax	State Inc. Tax	F.I.C.A.	Bonds	Ins.	Hosp.			
	TOTALS												

Name ______________________

Period ____________________

Date Started ______________

Date Completed ____________

Grade _____________________

MEMORANDUMS

Objectives: The student will be able to:

1. list the four sections in the heading.
2. determine the subject line from the content of the message.
3. use 1 - 1½ inch margins when setting up the form.
4. use double spacing between heading lines.
5. use triple spacing between the subject line and the body of the memo.
6. use block style with all parts.
7. use proper spacing after all punctuation marks.
8. use single spacing in the body of the memo.
9. demonstrate the proper use of enclosure and attachments by listing them on the form.
10. demonstrate the proper use of copy notation by listing it on the form.
11. state where the initials of the sender may be recorded.
12. distinguish between the traditional memo form and the modern heading.
13. type the date line on the "No Heading Memo" by omitting the word "date."
14. type the "To" line on the "No Heading Memo" just the same as the traditional memo.
15. type the "From" line on the "No Heading Memo" by omitting the word "From."
16. type the "Subject" line on the "No Heading Memo" by omitting the word "Subject" and using all capital letters.

Maximum Time Allowed:

2 days

Paper Heading: Type your Name on the BACK of each page
Date
Period
Page Number, Task Number

Procedures:

1. Read the information on pages 120 - 123.
2. Type Task 5 (page 126) in the same form as example 1 on page 120.

3. Type Task 8 (page 127) in the same form as example 2 on page 120. No copy notations please.
4. Type Task 9 (page 127) by following the directions for a "No Heading Memo" form. Follow steps 13, 14, 15, and 16 in "Objectives." No copy notations please.

Grading:

Your work will be graded on the following items:

1. Tasks typed in proper form.
2. Proper headings on back of each page.
3. All errors have been neatly corrected.
4. Uncorrected errors or messy corrections will lower your grade according to the scale below.

1 uncorrected or messy errors - B
2 uncorrected or messy errors - C
3 uncorrected or messy errors - D

Advanced Typing
Pages 125 - 129

Name ______________________

Period ____________________
Date Started ______________
Date Completed ____________
Grade _____________________

CORRESPONDENCE UNIT

Directions:

1. Type each task correctly - type your name, task number, and page number on the back of your paper.
2. Submit each completed task as you finish typing it with this paper clipped to the task.
3. Possible points will be recorded on this grading sheet and returned to you.
4. When you finish all of the tasks, resubmit all the tasks stapled in numerical order with this sheet as the first page.

Grading:

Major Errors		Grading Scale including minor errors
0 - 1	A	4.0 - 3.6
2	B	3.5 - 2.6
3	C	2.5 - 1.6
4	D	1.5 - .6
5 or more	F	.5 - 0

Task Number	Job Description	Points Earned
1	Letter - Block style	
2	Memo	
3	Letter - Modified style	
4	Letter - AMS Simplified	
5	Memo	
6	Letter	
7	Letter - Block, mixed punc.	
8	Memo	
9	Memo - 2 carbon copies	
10	Letter - Modified with open punctuation	
11	Letter - AMS Simplified	
12	Memo - 1 carbon copy	

Task Number	Job Description	Points Earned
13	Letter	______
14	Letter - Block with 2 carbon copies	______
15	Letter	______
16	Letter	______
	TOTAL POINTS	______
	÷ 16	______
	LETTER GRADE	______

Name ____________________

Period ____________________

Date Started ____________

Date Completed ____________

Grade ____________

PREPARATION OF COPIES

Objectives: The student will be able to:

1. distinguish between the products of
   a. carbon copy.
   b. copying machine.
   c. special sensitized paper which automatically reproduces on a second sheet.
2. use a photo copy machine.
3. set up a carbon pack in correct order and with proper paper.
4. type a letter with a carbon copy.
5. set the multiple copy control level on the typewriter on the appropriate position for the number of copies to be typed.
6. set the impression control level on the typewriter on the appropriate position for the typing task.
7. use the proper sequence of steps for correcting errors when using a carbon pack.
8. state where a copy notation is located on a letter.
9. use the lower case "c", without a period, to represent copy on a letter.
10. list the names of persons receiving a copy of a letter in alphabetical order by last name in appropriate place on a letter.
11. demonstrate proper care of carbon paper.
12. recognize when carbon paper needs to be replaced.

Materials Needed:

1. Carbon paper
2. Typing paper
3. Typing paper - second sheets
4. Typing shield
5. Pencil eraser

Procedures:

1. Read pages 96-98.
2. Type Task 10 (page 128) in acceptable letter style with carbon copy.
3. Type Task 9 (page 127) in an acceptable memo style with a photo copy attached.

Grading:

1. Objectives read and applied while typing assigned tasks.
2. Second sheets used for carbon copies.
3. All errors have been neatly corrected on original and carbon copy.

TWO-PAGE LETTER

February 20, 1981 -- ARA Services, Inc. 2503 Lombard Street Philadelphia, PA 19146 Attention Public relations Director Gentlemen: Subject: Youth Work Experience Program

(Par. 1) There are thousands of students in our high schools today who need summer jobs, part-time jobs, and ~~tn~~ on-the-job work experience. The Youth Work Experience Program is emerging as one of the leading educational tools through which school curriculum planners can develop a viable educational program designed to involve business and industry in the work of our schools, and we need your help. (Par. 2) What can a Youth Work Experience Program do for young people and for your company, you might ask. For one thing, the program is designed to introduce students to the world of work, and most young people prefer working to loafing. All they ask is an opportunity to work. In addition, work experience helps students develop the job attitudes, job knowledges, and requisite skills needed for job. For these young persons, on-the-job work experience in their areas of career interest causes education to take an added relevance. For business and industry, the program helps to provide a pool of qualified, potential employees. (Par. 3) But the Youth Work experience P~~n~~rogram does much more as is evidenced by the following experience of a large West Coast company that is currently participating in the program. Sometime ago, a group of executives of this company were considering the obligation of business and industry to cooperate with our schools by providing work experience opportunities for students. "There are a lot of students who need summer jobs," said one executive, "what can we do for them?" We always hire students to work in our retail outlets, " replied another executive. "But we can do something more," suggested a third, "why not help them set up and r~~j~~un their own owned-and-operated, income-producing business?" (Par. 4_) And then the w~~e~~heels began to trun. High scbools near each of the retail outlets of this merchandising firm were contacted. Over 300 students met and discussed the kinds of business they would like to set up and run themselves. The ideas flowed. The merchandising company agreed to supp~~p~~ly the facilities, merchandisng counseling, and investment capital for each student-operated company. (Par. 5) All this involvement has meant a lot of work for this company The company now sponsors each year, at each of its retail outlests a Summer Youth Fair. The shops and services comprising the Summer Youth Fair are planned and managed by high school students and are operated in the parking lots of the company's retail outlets. The shops and services run the gamut from ice cream parlors to bakeries to handicrafts to candle shops to flea markets. Each of the entrepreneural activities has its own student manager and staff members. All profits are divided among young employees. But, in addition, these student workers get much, much more. They get the actual and invaluable experience of planning and operating a small business enterprise. (Par. 6) And what does the merchandising company get from all this? Well, mostl~~e~~y a lot of competition and no money. But as the president of the company has said, "We have gained a sense of satisfaction in helping young people work within the sytem in their own way. And who knows...from this small beginning might even come a few future vice-presidents of our company." But it hasn't been all one-sided either," he hastened to add, "we've received much favorable publicity, and, often, the additional customers who come to patronize the Summer Youth Fair boo~~t~~hs drop in our stores and spend additional monies. The increase in our retail sales attests to this fact."

(Par. 7) So there you have the story of the experience of one company in the Youth Work Experience Program. We'd like to add you to our nationwide list of participating companies in the program. Why not return the enclosed card today and welll have an educational representative from your community call on you to help you plan your participation in the program. I can assure you the rewards will be many. Furthermore, you~~r~~ will be participating in the excitement of helping young people get a better education. Sincerely yours, R.J. Rogers, Executive Secretary (Your initials--Enclosure--cc: Ms. Mary Tree)

(Par.) P.S. We shall send you our Youth Work Experience Program brochure soon. This brochure shows, in concise, pictorial form. the highlights of the program. You'll enjoy thumbing through it.

Advanced Typing

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

ENVELOPES

Objectives: The student will be able to:

1. distinguish a small envelope from a large envelope.
2. know that small envelopes are used mainly for personal use.
3. know that large envelopes are preferred by businesses.
4. locate the placement of the following parts on an envelope:
   a. return address.
   b. mailing address.
   c. confidential notations.
   d. registered and special delivery notations.
5. type a ZIP code for every mailing address.
6. type the two letter (capitals) abbreviations for states.
7. properly place the return address by sight.
8. properly place the mailing address by sight.

Materials Needed:

1. Large envelopes (obtain from instructor)
2. ZIP Code Directory (on reference table)
3. "Addressing Mail in the Eighties", W.T. Deroche, Jr.

Procedures:

1. Read the attached article "Addressing Mail in the Eighties."
2. Type envelopes to the following and use your address as the return address:
   a. Your Business Ed. instructor at your high school - send registered mail.
   b. A friend living in another state and mark for special delivery.
   c. A business firm in the Spokane area.
3. Using the ZIP Code Directory, find the correct ZIP codes for the following:
   a. Mad River, CA __________
   b. South 3825 Abbott Road, Spokane, WA __________
   c. 38 Beechwood Avenue, Poughkeepsie, NY __________
4. Staple envelopes to this sheet and return to the instructor when finished.

Grading:
1, Tasks typed accurately and in proper form.
2. ZIP Codes correct.

Addressing Mail in the Eighties

Mr. DeRoche is Marketing Analyst, Regular Mail Services Division, United States Postal Service, Washington, D.C.

W. TIMOTHY DEROCHE, JR.*

During the last twenty years, advances in technology have required several changes in the envelope addressing format preferred by the U.S. Postal Service.

Two main technical factors have led to the changes in address format: the ZIP Code and the Optical Character Reader (OCR). The OCR is a piece of automated equipment that reads the address on a piece of mail so that it can be automatically sorted according to ZIP Code. The various digits of the ZIP Code "tell" the sorting machine the mail's final destination and routing in terms of the geographical area of the country, the distribution center, the individual post office, and, in the near future, the odd or even side of a particular city block (even a specific building).

This advanced technology minimizes errors and results in a more modern, more efficient Postal Service. To take advantage of these efficiency advances, office education teachers should encourage students to use the following addressing guidelines. Doing so will insure that mail can be processed automatically and accurately, thereby improving service, reducing the chance of unnecessary delays, and holding mailing costs in check.

General Recommendations for Addressing

1. The address should be prepared in a type style that the OCR can read accurately; otherwise, the envelope will be rejected by the automated equipment and will have to be sorted by slower manual methods. Standard typewriter typefaces (pica and elite) are obviously acceptable, for they are the commonest means of addressing envelopes. Avoid using script, italic, cyrillic, or artistic typefaces, however, because the machinery cannot read these.

---

*Prepared in collaboration with Jerry W. Robinson, Assistant Vice President and Senior Editor, South-Western Publishing Co., Cincinnati, Ohio.

Examples:

Good: LOS ANGELES CA 90024
SEATTLE WA 98146
Poor: *CHICAGO IL 60618*

2. All words in the address should be fully capitalized.
3. No punctuation marks need to be used.
4. The address should be in *block* format, all lines starting at the same horizontal point.

Examples:

Good: MR TIMOTHY J REGAN
1099 DUBLIN ST
BILLINGS MT 59101

Poor: MS MARY ANN ADAMS
302 HIGHLAND AVE
TROY NY 12180

5. One character space should be left between words, but two to five spaces should be left between the state name abbreviation and the ZIP Code. Standard two-letter state name abbreviations should be used.
6. All of the address lines should be *single*-spaced.
7. For both the return and destination addresses, the address block should be in the following sequence:
    a. The top line of the destination address should contain the name of the recipient; of the return address, the name of the sender.
    b. One or more additional lines may be inserted for additional identifying information such as the name of a company, agency, department, and so forth.
    c. The next to last line should contain the street number and name or the route number and box number. Mail addressed to occupants of multiunit buildings should include the number of the apartment, room, suite, box, or other unit. These numbers should appear immediately *after* the street address on the same line or, if necessary, on the line above the street address. They should never be placed below or in front of the street address. Mail sent to post office box numbers should read "Post Office Box ___*(number)*" or "PO Box ___." When a station name is shown, it should be typed on the line immediately above the box number.
    d. The bottom line should contain the name of the city, the state name abbreviation, and the ZIP Code. The following examples illustrate correct sequencing of address lines.

Attention line and room number

JOHNSTON STEEL CO
ATTN MR C P JONES
12200 MAINE ST RM 301
DETROIT MI 48212

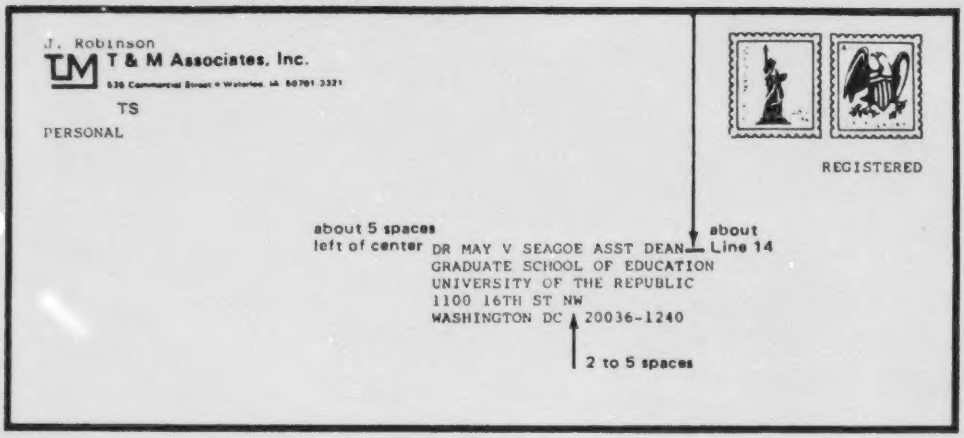
Post office box number

MRS ARLENE MORRISON
APEX OFFICE SUPPLY CO
POST OFFICE BOX 448
ORANGE NJ 07052

MRS ARLENE MORRISON
APEX OFFICE SUPPLY CO
PO BOX 448
ORANGE NJ 07052

8. The destination address block must be at least one inch from the left and right edges of the envelope and must be at least 5/8 inch but not more than three inches from the bottom edge of the envelope. A near-center location is best. If any information not related to the address is absolutely necessary, it may be placed above the top address line but never below or on either side of the address.
9. The return address should be typed (blocked and *single*-spaced) near the upper left-hand corner of the envelope. *Be sure to include the return ZIP Code.*
10. Mail notations, such as *Special Delivery* or *Registered*, should be typed below the stamp position and, if possible, three line spaces above the destination address. The notation should be typed in all capitals because all-capital notations require fewer typewriter strokes than cap-and-lowercase notations that are underlined.
11. Addressee (on-receipt) notations such as *Hold for Arrival, Please Forward, Personal,* and so on, should be typed a triple space below the return address near the left edge of the envelope. All such notations should be typed in all capitals.
12. Use standard two-letter state abbreviations; other common address abbreviations may be used to shorten address lines (lists on page 221).
13. Circumstances occur in which both a post office box number and a street address may be used. The important thing to remember when both are shown is that the address where you want the mail delivered must appear on the line immedi-

Large business envelope properly addressed



J. Robinson
T & M Associates, Inc.

TS

PERSONAL

REGISTERED

DR MAY V SEAGOE ASST DEAN
GRADUATE SCHOOL OF EDUCATION
UNIVERSITY OF THE REPUBLIC
1100 16TH ST NW
WASHINGTON DC 20036-1240

16. If window envelopes with addressed inserts are used, the address on the insert must be positioned so that it will show in the window throughout the insert's full range of movement. There should be at least 1/4 inch between the address and all edges of the window, whatever the position of the insert.

MISS ALBERTA JACKSON
CHESTNUT HILL SQ
3672 BEECHAM LN APT C
CINCINNATI OH 45208-1314

17. For automatic sorting, envelopes must be larger than 5 by 3 1/2 inches and smaller than 11 1/2 by 6 1/8 inches. Smaller envelopes may be returned to the sender while larger ones will be subject to a surcharge.

Key Teaching Points

Because the address on the business letter itself is typed in cap-and-lowercase letters with punctuation marks and is generally used as the "copy" for typing the envelope, students need practice in converting such addresses to all-cap unpunctuated format. The key points in making these conversions are:

1. Proper location of the address block.
2. Proper line and word spacing.
3. Correct sequence of address information (the letter and envelope addresses should agree in this respect).
4. Full CAPITALIZATION of the envelope address.
5. No punctuation in the address.
6. Use of proper abbreviations (letter and envelope addresses often differ in this respect).
7. Use of correct ZIP Codes with two to five spaces separating the state name abbreviation and the ZIP Code.
8. Use of expanded ZIP Codes (the five digits currently assigned plus four more preceded by a hyphen) as soon as expanded ZIP Codes are assigned to business and individual mailers.

These guidelines should result in address style/placement that is professional in appearance and that will facilitate fast, accurate, and efficient mail service.

Editorial Notes

1. For learning ease and consistency, it is recommended that students be taught to leave two spaces between state abbreviation and ZIP Code.
2. To assure an inch of blank space at the right of the address block, the address must often start left of horizontal center (10 spaces for small envelopes, 5 spaces for large envelopes).
3. Except for state names, the use of abbreviations is optional, their use being for the purpose of shortening unusually long lines.
4. Because letter and envelope addresses should be in the same sequence, the attention line when used should be the second line of the letter address.
5. Although the USPS prefers the all-cap unpunctuated address format, cap-and-lowercase addresses as customarily punctuated *can* be sorted accurately and efficiently but not quite so rapidly as those typed in the preferred format. The federal government in fact, in *U.S. Government Correspondence Manual* (1977), specifies cap-and-lowercase addresses.

ately above the bottom line. Examples:

mail will be
delivered
here -------▶ GRAND PRODUCTS INC
718 W BURNSIDE ST
PO BOX 2700
PORTLAND OR 97208*

mail will be
delivered
here -------▶ GRAND PRODUCTS INC
PO BOX 2700
718 W BURNSIDE ST
PORTLAND OR 97209*

*The ZIP Code must be the correct one for the delivery address. In 1981 the U.S. Postal Service began assigning expanded ZIP Codes which should be used as follows:

PORTLAND OR 97209-2456

14. The U.S. Postal Service realizes that there are numerous combinations of address information. A few examples of acceptable alternate forms of addressing are given below. Check with your local post office for other alternate forms.

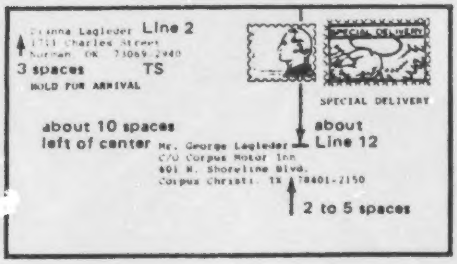
MISS AIDA MARTINEZ
ACCOUNTING DEPT
ABC CORP RM 809
3518 E INDUSTRIAL PKY
CLEVELAND OH 44135-1473

ADMITTING OFFICE
MEMORIAL HOSP RM 2B
WATERLOO IA 50703-3482

MR DAVID JENSEN
CIRCLE Y RANCH
RT 1 BOX 23
CHEYENNE WY 82001-1028

MRS OSAMI SHINODA
1900 43D AVE APT 1204
SAN FRANCISCO CA 94116-2146

Small personal envelope acceptably addressed



State Name Abbreviations

Alabama, AL
Alaska, AK
Arizona, AZ
Arkansas, AR
California, CA
Colorado, CO
Connecticut, CT
Delaware, DE
District of Columbia, DC
Florida, FL
Georgia, GA
Guam, GU
Hawaii, HI
Idaho, ID
Illinois, IL
Indiana, IN
Iowa, IA
Kansas, KS
Kentucky, KY
Louisiana, LA
Maine, ME
Maryland, MD
Massachusetts, MA
Michigan, MI
Minnesota, MN
Mississippi, MS
Missouri, MO
Montana, MT
Nebraska, NE
Nevada, NV
New Hampshire, NH
New Jersey, NJ
New Mexico, NM
New York, NY
North Carolina, NC
North Dakota, ND
Ohio, OH
Oklahoma, OK
Oregon, OR
Pennsylvania, PA
Puerto Rico, PR
Rhode Island, RI
South Carolina, SC
South Dakota, SD
Tennessee, TN
Texas, TX
Utah, UT
Vermont, VT
Virgin Islands, VI
Virginia, VA
Washington, WA
West Virginia, WV
Wisconsin, WI
Wyoming, WY

Other Common Address Abbreviations

Association, ASSN
Avenue, AVE
Boulevard, BLVD
Circle, CIR
East, E
Expressway, EXPY
Freeway, FWY
Heights, HTS
Highway, HWY
Hospital, HOSP
Institute, INST
Lake, LK
Lakes, LKS
Lane, LN
Manager, MGR
North, N
Northeast, NE
Northwest, NW
Palms, PLMS
Park, PK
Parkway, PKY
Place, PL
Plaza, PLZ
President, PRES
River, RIV
Road, RD
Route, RT
Rural, R
Secretary, SECY
Shore, SH
South, S
Southeast, SE
Southwest, SW
Square, SQ
Station, STA
Treasurer, TREAS
Turnpike, TPKE
Union, UN
Vice President, VP
View, VW
Village, VLG
West, W

15. Mail addressed to a foreign country should have the name of that country as the last line of the address block, a double space below the city, state, and ZIP Code line.

Monsieur Paul Dupont
150, Rue Nepean, App 5
OTTAWA (ONTARIO) K2P0B6*

CANADA

*Coding systems vary from country to country.

Name ____________________

Period ____________________

Date Started ______________

Date Completed ______________

Grade ______________

EDUCATIONAL MANUSCRIPT WITH TRADITIONAL FOOTNOTES

Objectives: The student will be able to:

1. type in proper form an educational manuscript according to the form shown in "The Term Paper, A Manual and Model", 4th Edition, by Cooper and Robins.
2. correctly format traditional footnotes.
3. place footnotes at the bottom of each page, allowing for bottom margin.
4. use the variable line spacer to place superscript denoting a footnote.
5. make and use a backing sheet.
6. recognize proper spacing, margins, indentations for an educational manuscript.
7. properly place titles, major headings, and side headings.
8. number pages of manuscript properly.
9. type a title page.
10. type a Table of Contents.
11. type a bibliography.

Materials Needed:

1. Plain typing paper
2. Correction material
3. Advanced Typing Book
4. Booklet: "The Term Paper, A Manual and Model", (obtain from instructor
5. A report cover

Maximum Time Allowed:

14 days

Procedures:

1. Read Chapter IV in the orange booklet, "Preparing the Term Paper for Presentation."
2. Take the attached test. You may use the book.
3. Correct your own test, using the key obtained from the instructor.
4. Make a backing sheet, using the attached example as a model.
5. Type Task 1 beginning on page 138 of your Advanced Typing Book.

6. Submit each page of the manuscript to the instructor for grading. It will be returned to you for corrections. Save them.
7. Type a Title page. (Use the title page in orange manual as example.)
8. Type a Table of Contents. (Use orange manual example.)
9. Type a bibliography. (Use orange manual as example.)
10. When you have completed the manuscript, and made any corrections, put the manuscript together and submit to instructor in a report cover.
11. Put the grading sheet (attached) in the front of the manuscript and the test at the back of the manuscript in the report cover when submitting.

Grading:

Your grade will be determined according to the grading sheet.

Attachments:

1. Outline of "Did You Say What I Thought You Said."
2. Example of Backing Sheet
3. Footnote and Bibliography instruction sheet
4. Educational Manuscript Test
5. Grading Sheet

DID YOU SAY WHAT I THOUGHT YOU SAID

Introduction

Effective Communications

Definition

Ingredients for Communication

The Speaker.---------

The Listener.-----

Message or subject.------

Levels of Communication

Verbal level.-----

Non-verbal level.-----

Problems In Communications

Misunderstanding

Assuming too much.-----

Failure to listen properly.-----

Perception.-----

Planning.-----

Summary

(Based on "The Term Paper, 4th Edition, Cooper and Robins)

FOOTNOTES

1. Name of author (first name and last name)
2. Name of article (if any) in "quotation marks"
3. Name of book, magazine, etc., underlined
4. Page number(s)

Example:

10. Elton Howardson, "No One is Listening to Me!", Today's Speech, pp. 14-20.

NOTE: Footnotes are indented three (3) spaces; the second line of the footnote begins at the left margin.

BIBLIOGRAPHY - Alphabetized by last name of author

1. Name of author* (last name, first name)
2. Name of article in "quotation marks" (if any)
3. Name of book, magazine, pamphlet, etc., underlined
4. Edition number (if any)
5. City of publication
6. Publishing company
7. Date of publication

Example:

Howardson, Elton, "No One is Listening to Me!", Today's Speech Allis Joyson Publishers, 1975.

NOTE: Only first author is given last name first, second and third authors of same work are given first name first.

Advanced Typing
EDUCATIONAL MANUSCRIPT
Page 6

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________

EDUCATIONAL MANUSCRIPT TEST

1. What are the margins for a left bound manuscript? Left margin ______, Right margin ______.
2. How many inches are left at the top and bottom of a page? ______
3. On what line does the title of the the first page of a manuscript begin? ______
4. On what line do the second and succeeding pages begin? ______
5. How many spaces are there between the title and body of the manuscript? ______
6. How many spaces do you indent for a new paragraph? ______
7. Is the body of a manuscript double or single spaced? ______
8. How far above the typing line should the superscript be typed? ______
9. Do you use the variable line spacer or left platen knob to move your typing line to make the superscript? ______
10. How many spaces are there between the last line of text and the line at the bottom of the page separating the text from the footnotes? ______
11. How long is the line that separates the text from the footnotes? ______
12. How many spaces are there between the line and the first footnote? ______
13. Which key should be used when typing the separating line? ______
14. How many spaces do you indent for the first line of a footnote? ______
15. Where does the second line of a two-line footnote begin? ______
16. How many spaces are left between footnotes? ______
17. Are the numbers indicating the number of the footnote raised in the footnote? ______
18. In what order do the following appear in the footnote:
    ____ Name of article in book or magezine
    ____ Title of book or pamphlet
    ____ Name of author
    ____ Page number
    ____ Volume or edition number
19. In a footnote, do you type the name of the author's name last name first? ______
20. In a footnote, the name of the article is shown by using . . . ______

21. In a footnote, the title of a book, magazine, or pamphlet is designated by ______________.

22. In an "anonymous" footnote, how do you begin the footnote? ________________.

23. In the bibliography, items should be listed _________________ using the last name of the author.

24. If there are two or more items by the same author, how should you list the entries? ________________________

25. How do you indicate the second item in a bibliography by the same author? ________________________________

26. In the bibliography, where should you begin each new entry? _______________

27. The second line of an entry in the bibiography should be indented how many spaces? ______________

28. In what order do the following appear in the bibliography:
    _____ Volume or edition number
    _____ Name of article
    _____ Place of publication
    _____ Name of author
    _____ Date of publication
    _____ Publisher's name

Check your answers with the key.

NOTE: Many of the answers to this test can be found on the inside of the back cover of the orange Term Paper Manual. Be sure and use the orange manual when you have a question as to format of the manuscript.

PLACE THE COMPLETED AND CORRECTED TEST AT THE END OF THE MANUSCRIPT WHEN YOU HAVE COMPLETED THIS UNIT.

Advanced Typing
EDUCATIONAL MANUSCRIPT
Page 8

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

GRADING SHEET

	Possible Points	Points
Title Page	5	_____
Table of Contents	15	_____
Bibliography	20	_____
Body: Form (margins, spacing, etc.)	20	_____
Footnotes	30	_____
Spelling/Proofreading	30	_____
Error correction	20	_____
Overall neatness	10	_____
TOTAL	150	TOTAL _____

A = 150-143 points
B = 142-128 points
C = 127-112 points
D = 111-105 points

PLACE THIS SHEET IN THE FRONT OF YOUR MANUSCRIPT BEFORE SUBMITTING.

AMS SIMPLIFIED

Mr. S. W. Jackson, Manager
North American Cement Corp.
38478 Bartlett Avenue
Mr. View, CA 98111

AMS SIMPLIFIED STYLE

This letter is typed in the timesaving simplified style recommended by the Administrative Management Socity. To type a letter in the AMS style, follow these steps:

1. Use block format with blocked paragraphs.

2. Omit the salutation and complimentary close.

3. Include a subject heading and type it in all caps a triple space below the address; triple space from the subject line to the first line of the body.

4. Type enumerated items at the left margin; indent unnumbered listed items five spaces.

5. Type the writer's name and title in all caps at least four lines below the letter body.

6. Type the reference initials (typist's only) a double space below the writer's name.

Correspondents in your company will like the AMS simplified letter style not only for the "eye appeal" it gives the letters but also because it reduces letter-writing costs.

S. MARK RUSSELL - PRESIDENT

lau

PART 4 Centering and Tabulating Processes

Horizontal Centering Guides

1. Clear margins by moving stops to the extreme ends of the scale.
2. Clear all tab stops; then set a tab stop at the center of the paper.
3. Tabulate to the center of the paper.
4. From the center, backspace once for every 2 letters, figures, spaces, or punctuation marks in the line. Disregard odd or leftover strokes at the end of the line.
5. Begin to type where the backspacing ends.

Vertical Centering Guides

Basic Rule

From the vertical center of the paper, turn the platen (cylinder) back once for each 2 lines, 2 blank lines, or line and blank space. Disregard an odd or leftover line.

Steps in Centering

1. From Top of Paper
   To move paper to vertical center, start spacing down from the top edge of the paper.
   a) half sheet
      down 6 TS (triple spaces)
      + 1 SS (Line 17)
   b) full sheet
      down 11 TS
      + 1 SS (Line 34)
2. From Vertical Center
   a) half sheet, SS or DS: follow basic rule, turn platen back 1 for 2
   b) full sheet, SS or DS: follow basic rule, turn platen back 1 for 2

(See illustration, page 18)

Spacing Tables

1. Count the lines in the complete table including the blank lines.
2. Subtract the number of lines to be used from lines available. There are 66 lines on a full sheet of paper and 33 on a half sheet.
3. Divide by 2 to get the top and bottom margins. Disregard fractions if they exist. Space down from the top edge of the paper 1 more than the number of lines required for the top margin.

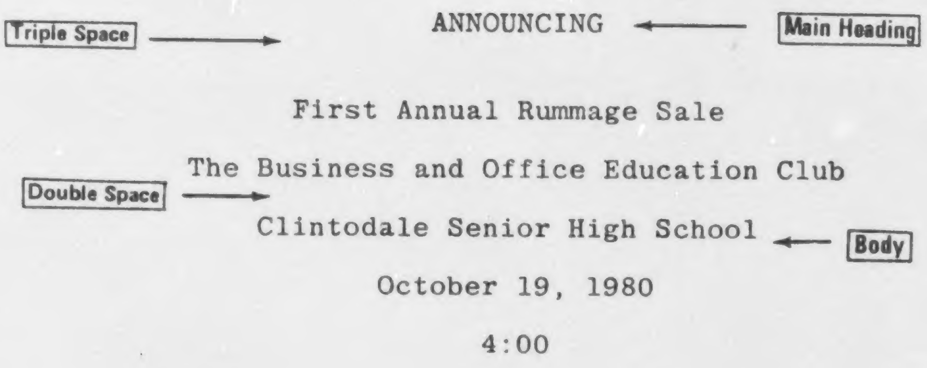
Table Centering Guides

1. Center paper in the machine.
2. Clear all the tab stops; then set a tab stop at the center of the paper.
3. Decide on the number of spaces to be used between the columns (4, 6, 8, etc.).
4. Tabulate to the center of the paper.
5. Backspace once for each two spaces in the longest word in each column.
6. Backspace once for each two spaces between the columns. Set the margin. This is the point where the first column begins.
7. From the left margin, depress the space bar once for each letter, figure, space, and punctuation mark in the longest item in the first column and once for each space between columns 1 and 2. Set the tab stop for the second column. Continue this way until all stops have been set.
8. Return the carriage and operate the tab bar to check that all tab stops have been set.

(See illustration, page 18)

Reading Position

To place copy in the reading position, which is above exact vertical center, subtract 2 line spaces from the exact top margin.


Triple Space
Main Heading
Double Space
Body

ANNOUNCING

First Annual Rummage Sale

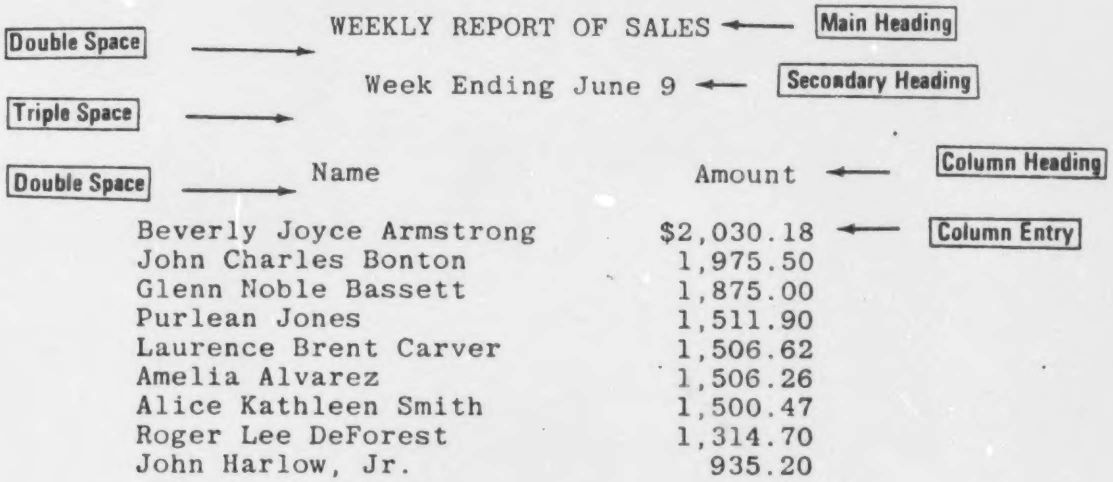
The Business and Office Education Club

Clintodale Senior High School

October 19, 1980

4:00

Properly Spaced and Centered Notice/Announcement


Double Space
Triple Space
Double Space
Main Heading
Secondary Heading
Column Heading
Column Entry

WEEKLY REPORT OF SALES

Week Ending June 9

Name	Amount
Beverly Joyce Armstrong	$2,030.18
John Charles Bonton	1,975.50
Glenn Noble Bassett	1,875.00
Purlean Jones	1,511.90
Laurence Brent Carver	1,506.62
Amelia Alvarez	1,506.26
Alice Kathleen Smith	1,500.47
Roger Lee DeForest	1,314.70
John Harlow, Jr.	935.20

Properly Spaced and Centered Table

How to Center Column Headings

To center column headings, use these guides:

1. Find the center of each column by:
   a. Moving the carriage to beginning of the column and noting the scale number.
   b. Moving the carriage to the last letter or figure in the coulmn and noting the number on the scale.
   c. Add the two numbers; then divide by 2 to get the center point of the column.
2. Position the carriage at the center point.
3. Backspace once for each 2 spaces in the heading.

JOB 7 ▪

Two-Column Table with Column Headings

Type once; DS body

DS between column headings and body.

Center entire job with 15 spaces between columns.

Full sheet

		words
ENTRY-LEVEL JOBS BY COMPANY SIZE		7
Company Size	Percent	11
Fewer than 4 employees	4.1	16
Between 4-24 employees	28.6	22
Between 25-99 employees	16.3	28
Between 100-199 employees	18.3	35
Between 200-500 employees	10.3	41
Over 500 employees	22.4	46

JOB 8 ▪

Two-Column Table with Secondary and Column Headings

Type once; DS body

TS between secondary heading and column headings; DS between column headings and body.

Center horizontally and in reading position with 15 spaces between columns.

Full Sheet

		words
RESULTS OF EMPLOYER INTERVIEWS		6
(Clerical Jobs Only)		10
Classification	Number	15
Completed Interviews	149	20
Would not Cooperate	13	24
Unable to Locate	13	28
Business Discontinued	11	33
Partially Completed	3	38
Firms Outside City Limits	2	43

76 JOB 13 ■

Two-Column Table with Source Note from Script

Type once; SS body

Center vertically and horizontally with 12 spaces between columns.

Half Sheet

Source Note Follow the same directions as given in JOB 11.

words

DAILY SALES OF MOST ACTIVE STOCKS 7

New York Stock Exchange 12

Corporation	Shares	words
		15
American Motors	1,357,700	21
Texas Instrument	1, 062, 700	26
Sperry Rand	965, 900	30
Texaco Inc.	873, 300	34
Dow Chemical	868, 200	38
Sears Roebuck	863, 900	43

46

Source: Wall Street Journal. 52

JOB 14 ■

Two-Column Table with Footnote from Rough Draft

Type once; DS body

Center horizontally and in reading position with 12 spaces between columns.

Full Sheet

Footnote

Follow the same directions as given in JOB 12.

words

RANKING OF FREQUENTLY USED BUSINESS MACHINES 9

ds

(According to Recent Graduates) 15

Business Machine	Frequency*	words
Typewriter~~s~~	31	24
Adding/calculator	22	28
Register/Cash	13	31
Copying	13	34
Data Process~~e~~ing	5	37
Dictating~~/~~ Transcribing	5	42

46

---

*Many individuals reported using more than one office or retailing machin~~s~~e. 55 61

JOB 13 ■

77

Three-Column Table with Totals

Type once; SS body

Center vertically and horizontally with 10 spaces between columns.

Full Sheet

Totals
See JOB 11, page 34

			words
	WEEKLY AUTOMOBILE PRODUCTION		6
	General Motors		9
Make	This Week	Last Year	14
Chevrolet	14,610	12,074	19
Camaro	6,815	10,592	23
Malibu	10,060	10,592	27
Chevette	10,390	5,951	31
Corvette	1,000	968	35
Monte Carlo	4,195	8,711	40
Monza	3,280	4,114	43
Citation	6,380	6,060	48
			50
	56,730	59,062	53

OB 14 ■

Three-Column Table with Leaders

Type once; DS body

Center vertically and horizontally with 10 spaces between columns.

Full Sheet

Typing Leaders
In typing leaders, alternately strike the period and space bar.

Note whether you typed the first period on an odd or even number on the scale. Periods on all succeeding lines should begin on an odd even number also.

			words
	ADVERTISING BUDGET		4
	National College		7
Advertising Media	Weekly	Percent	14
Direct Mail	$1509.60	34	24
Newspapers	.1243.20	28	35
Catalog	532.80	12	45
High School Publications . . .	355.20	 8	55
National Magazines.	222.00	 5	66
Radio	222.00	 5	76
Directories	177.60	 4	86
Calendars, Novelties, etc. . .	177.60	 4	97

JOB 7 ■

Four-Column Table with Main, Secondary, and Column Headings

Type once; DS body

Center vertically and horizontally with 8 spaces between columns.

Full Sheet

words

WEEKLY SALARY AVERAGES FOR 9 JOBS 7

United States 10

	1979	1980	Increase	
				13
Mail Clerk-File Clerk	$ 144.00	$150.00	7.1%	22
Accounting Clerk	177.00	185.00	6.3%	29
Machine Operator	159.00	164.00	5.0%	36
Switchboard Operator	157.00	165.00	8.2%	44
Typist, Clerk	153.00	159.00	8.2%	51
Stenographer	162.00	170.00	7.7%	57
Secretary	195.00	204.00	6.6%	63
Keypunch Operator	166.00	173.00	6.6%	71
Computer Operator	206.00	215.00	6.2%	78

JOB 21 ■

Long Four-Column Table from Rough Draft

Type once; DS body

Center vertically and horizontally with 6 spaces between columns

Full Sheet

OCEANS AND SEAS OF THE WORLD — words 6

Ocean ~~and~~ or Sea	Area in Square Miles	Average Depth in Feet	Greatest Depth in Feet	words
				13 22
Pacific Ocean	70,000,000	13,215	35,958	29
Atlantic Ocean	31,815,000	12,880	30,246	37
Indian Ocean	25,300,000	13,002	24,4~~4~~60	45
Arctic Ocean	5,440,020	3,953	18,456	52
Mediterranean Sea*	1,145,100	6,188	15,197	61 68 75
Bering Sea	884,900	5,075	15,659	82
Gulf of Mexico	700,000	4,875	12425	89
Okhotsk Sea	~~700,000~~ 613,800	2,749	12,001	95
East China Sea	482,300	617	9,126	102
Hudson Bay	475,000	420	600	107
Japan sea	389,100	4,429	12,276	114
Andaman Sea	308,000	2,845	12,392	120
~~Read~~ Red Sea	170,000	1,611	7,254	131
North Sea	222,100	308	2,165	126
Baltic Sea	163,000	~~190~~ 180	1,380	137
*Includes Black Sea and Sea of Azov.				141 148
Caribbean Sea	1,049,100	8,685	22,788	
South China Sea	895,400	5,075	15,659	

PART 8 Ruled and Boxed Tables

How to Type Ruled Tables

Horizontal lines or rulings are often used in tables to set off the column headings. A full-width double ruling is usually typed above the column headings with a single one below them. A single ruling is also typed below the last items in the table.

Rulings can be the exact width of the table or extend several spaces beyond it. If the rulings are to be the exact length of the table, set your margin stops at the point where the first column begins and at the point where the longest item in the last column will end. You can then type rulings across the page until the carriage or the carrier locks.

Double Rulings

1. DS after the last line in the centered heading.
2. Type the first line of the double lines depressing the shift lock and operating the underscore key.
3. Operate the variable line spacer and move the cylinder slightly forward; type the second ruling.
4. DS between the ruling and the column headings.

Single Rulings

1. SS from column headings; type a single ruling; DS and type the first items in the columns.
2. SS and type a single line after typing the last items in the columns.

JOB 1 ▪

Ruled Table from a Model

Type once; DS body

Center vertically and horizontally with 18 spaces between columns.

Half Sheet

words

Double Space →

WEEKLY REPORT OF SALES 5

Week Ending June 9 8

Double Space →

19

29

Double Space → Name ← Single Space → Amount 31

41

← Double Space →

Name	Amount	words
Beverly Joyce Armstrong	$2,030.18	48
John Charles Bonton	1,975.50	54
Glenn Noble Bassett	1,875.00	60
Purlean Jones	1,511.90	64
Laurence Brent Carver	1,506.62	71
Amelia Alvarez	1,506.26	75
Alice Kathleen Smith	1,500.47	81
Roger Lee DeForest	1,314.70	87
John Harlow, Jr.	935.20	92

← Single Space →

102

Double Space →

Source: Management Statistics. 108

81

JOB 5 ■

Ruled Table from Rough Draft

Type once; DS body

Center horizontally and in reading position with 12 spaces between columns.

Insert rulings

Full Sheet

Retype; SS body

Center vertically and horizontally with 10 spaces between columns.

Half Sheet

			words
MELTING TEMPERATURES of COMMON METAL			8
			17
			26
Metal	Degrees F.	Degrees C.	32
			41
Aluminum	1215	657 ~~675~~	44 49
Bronze (Cast)	1650	899	54
Brass (yellow)	1640	893	
Copper	1920	1049	57
Iron, Gray Cast	1204	2200	62
Lead	620	323	65 70
Steel (.20%)	2800	1532	74
Tin	450	232	77
Sol der (50-50)	420	212	
			86

JOB 6 ■

Ruled Table from Script

Type once; SS body

Center horizontally and in reading position with 12 spaces between columns.

Insert rulings

Half Sheet

			words
DOMESTIC AUTO PRODUCTION			5
			16
			27
Firm	April	Year	30
			41
American Motors	5,906	50,261	47
Chrysler / Plymouth	44,336	339,954	54
Dodge	27,394	130,440	58
Ford	62,424	536,214	62
Lincoln / Mercury	26,098	217,681	68
Chevrolet	52,797	615,088	73
Pontiac	26,173	252,084	78
Oldsmobile	37,711	277,878	83
Buick	27,533	198,304	87
Cadillac	12,339	97,456	92
			103
Source: Automotive News.			108

Typing Boxed Tables

Vertical lines are often added to ruled tables to make the information presented stand out. Single vertical rulings that are centered between the typed columns are used for this purpose and extend from the top double horizontal ruling to the bottom single horizontal ruling.

Vertical Rulings

1. Type the ruled table in the usual way, inserting horizontal rulings as you type.
2. Remove the completed page and using a ball-point pen (preferably black ink), draw vertical lines exactly midway between the columns extending from the top to the bottom horizontal rulings.

JOB 7 ■

Boxed Table from Model

Type once; DS body

Center horizontally and in reading position with 10 spaces between columns.

Insert rulings

Full Sheet

words

TRUCK TIRE SALE 3

← Double Space

Popular Sizes 6

← Double Space

18

29

← Double Space

Size & Type	Range	Price	Tax	words
				35
Single Space →				46
Double Space →				
E78-14TL	C	$42.00	$2.70	51
G78-15TL	C	46.00	3.18	56
H78-15TL	C	58.00	3.45	60
L78-15TL	C	63.00	3.59	64
8.00-16.5TL	C	59.00	3.24	69
8.00-16.5TL	D	63.00	3.50	74
9.50-16.5TL	D	76.00	4.46	79
9.75-16.5TL	D	89.00	5.70	84

Single Space →

96

Double Space →

Source: Tire Manufacturers Association. 104

JOB 10 ■

Boxed Table from Script

Type once; SS body

Center vertically and horizontally with 8 spaces between columns.

Insert rulings

Full Sheet

words 83

ELECTRICAL GENERATING PLANTS 6

Under Construction 10

23
36

Plant	Capacity	Completion	Fuel	43
				56
Harley, Unit No. 2	860,000	1982	Nuclear	64
Carris Dam	135,000	1982	Hydro	70
Smith, Unit No. 2	660,000	1983	Coal	77
Smith, Unit No. 3	660,000	1984	Coal	84
Smith, Unit No. 4	660,000	1985	Coal	92
Batch, Unit No. 1	411,000	1985	Nuclear	99
Wallace Dam	104,000	1987	Nuclear	106
Golden Mountain	675,000	1988	Hydro	113

126

Source: Utilities Report. 132

JOB 11 ■

Boxed Table from Script

Type once; SS body

Center horizontally and in reading position with 8 spaces between columns.

Insert rulings

Full Sheet

words

PREPARATION FOR LIFE ACTIVITIES 6

Percent of Previous Students Who Felt School Helped 17

31
45

Activity	Great Deal	Some	Little	51
				65
Getting Along with People	56%	35%	6%	73
Using Good English	52	33	12	78
Using Math Skills	43	34	18	84
Community Affairs	41	35	19	89
Reading Efficiently	36	30	29	95
Getting a Job	34	45	20	99
Leisure Activities	20	45	28	105
Handling Money	15	34	42	110

124

Source: State Department Report. 130

6

PRODUCTION TYPING I

CURRICULUM OUTLINE

I. Leadership Development - 5 hours for review and introduction, with concepts integrated throughout the course

   A. Work Habits and Traits
      1. Attendance
      2. Punctuality
      3. Positive self-image
      4. Patience
      5. Enthusiasm
      6. Honesty
      7. Positive thinking

   B. Skills
      1. Follow written and oral directions
      2. Time management
      3. Handling criticism
      4. Problem solving

II. Work Station Maintenance - 5 hours

   A. Care of Equipment and Supplies

   B. Work Area Upkeep

   C. Safety

III. Error Detection and Correction - 5 hours

   A. Use of Reference Materials
      1. Office manual
      2. Word book

   B. Proofreading

   C. Correction Methods

IV. Application - 56 hours

   A. Letters/Envelopes

   B. Memos

   C. Tables

   D. Reports/Manuscripts

   E. Forms

V. Production Rate - 20 hours

   A. Straight Copy

   B. Correspondence

   C. Statistical

VI. Professional Growth - 1 hour

   A. Careers Utilizing Typing

   B. Training Opportunities

OBJECTIVES - EVALUATION

Objectives:	Evaluation:
Upon satisfactory completion of this course, the student will:	The student will:
I. Leadership Development - 5 hours for review and introduction, with concepts integrated throughout the course.	
1. Apply leadership development concepts.	1. Demonstrate the ability to apply appropriate concepts to develop: a. Work habits and traits (1) Attendance (2) Punctuality (3) Positive self-image (4) Patience (5) Enthusiasm (6) Honesty (7) Positive thinking b. Skills (1) Following written and oral directions (2) Managing time (3) Handling criticism (4) Solving problems
II. Work Station Maintenance - 5 hours	
1. Apply work station maintenance techniques.	1. Demonstrate the ability to maintain a work station, including: a. Care of equipment and supplies (1) Cleaning (2) Changing ribbons (3) Changing tapes (4) Changing paper (5) Handling diskettes b. Work area upkeep c. Safety

Objectives:	Evaluation:
III. Error Detection and Correction - 5 hours	
1. Apply error detection and correction techniques.	1. Demonstrate the ability to use reference materials, including: a. Office manual b. Word book 2. Demonstrate the ability to detect errors in printed material. 3. Demonstrate the ability to make corrections including: a. Correction fluid b. Backspace/strikeover c. Realignment d. Squeezing e. Spreading f. Delete g. Insert
IV. Application - 56 hours	
1. Apply appropriate formating concepts to five basic office applications.	1. Demonstrate the ability to arrange material attractively on a page: a. Centering (1) Horizontal (2) Vertical b. "Eyeball" 2. Demonstrate the ability to type from: a. Rough draft b. Handwritten copy 3. Demonstrate the ability to appropriately format: a. Letters/envelopes (1) Block (2) Other styles (3) Two-page letters (4) Copy notations (5) Variety of envelopes b. Memos c. Tables d. Reports/manuscripts (1) References (2) Outline (3) Title page (4) Table of contents (5) Bibliography e. Forms

Objectives:	Evaluation:
V. Production Rate - 20 hours	
1. Apply typing speed and accuracy and formating concepts to producing finished work in a reasonable period of time.	1. Demonstrate an acceptable production rate (based on district guidelines) for each of the following: a. Straight copy b. Correspondence c. Statistical
VI. Professional Growth - 1 hour	
1. Be aware of opportunities for professional growth for typists.	1. Recognize careers utilizing typing skills. 2. Recognize training opportunities for typists.

Production Typing I

ASSIGNMENT SHEET NO. 1

Name ______________________

Period ______________________

Date Started ______________

Date Completed ______________

Grade ______________

Objectives: The student will be able to:

1. improve speed on straight copy material.
2. improve or maintain error limit of no more than two (2) errors per minute on a straight copy timing.
3. demonstrate the Block Style format for a letter.
4. demonstrate the Modified Style format for a letter.
5. be aware that envelopes need to be typed in order that letter may be mailed.

Materials Needed:

Large envelope

Procedures:

1. Follow oral directions for completing Skill Drive 1 from the book, Typewriting Drills for Speed and Accuracy. All timings from this book will be for five minutes in length.
2. Fill in the blanks on the Speed and Accuracy Evaluation form.
3. Ask your instructor to explain the letter placement table located on page 148 of your textbook.
4. Type page 150 - 90b in Modified Style. Notice that modified is different than the Block Style in two areas:
    1. the dateline
    2. closing section = start at space 51
5. Type page 151 - 90c, #1 in Modified Style with indented paragraphs
   - 91c, #2 in Block Style
6. Complete Skill Drive 2 and record the information on the appropriate form.
7. Type page 152 - 91c, #1 in Block Style
   91c, #2 in Modified Style
8. Complete Skill Drive 3.
9. Type page 155 - 93c, #1 and 2 in an acceptable letter style(s).
10. Address a large envelope for 93c, #1. Follow the example found on page 85 of your textbook.

Grading:

Time Writes (0-10 errors)

A	32+
B	27 - 31
C	22 - 26
D	17 - 21

Letters: All errors must be neatly corrected. If you think the instructor might count a correction as an error, ask and find out. Each format error counts as one error.

A	0 - 1	D	5
B	2 - 3	F	6 and RETYPE
C	4		

Letter Post-Test #1

Please mail the following letter for me.

David Barton
1199 Riverview Drive
Des Moines, IA 50313

We want to be sure to give you credit, but not the kind of credit which is usually given by a credit manager. We mean the kind of credit which is defined by Webster as "praise or approval to which a person is entitled."

The way you have handled your account with us ~~B~~ during the past year certainly merits our praise. We appreciate the promptness with which you pay your account. So we want to say thank you and "give credit where credit is due." It is a pleasure to be of service to you.

Robert Burns, Credit Manager

100

Production Typing I
POST TEST

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

TABLES

Objectives: To evaluate the student's ability to format tables appropriately.

Materials Needed:

Statistical Typing with Tabulation Problems, Wanous and Kushner, 3rd Edition

Maximum Time Allowed:

1 class period

Procedures:

1. Type Job 3 from page 45 on a ½ sheet of paper and single space the body.
2. Type Job 10 from page 48 on a full sheet of paper and double space the body.
3. Type Job 16 from page 51 in an attractive format with leaders placed correctly.
4. Staple completed assignments behind this sheet and submit for grading.
5. Be sure to return the Statistical Typing booklet to your instructor.

Production Typing I
ASSIGNMENT SHEET NO. 2

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

Objectives: The student will be able to:

1. demonstrate the ability to use an office reference manual.
2. demonstrate the ability to appropriately format:
   a. two-page letter.
   b. copy notations.
   c. envelopes.
3. demonstrate the correct use of carbon paper and second sheets when typing a letter with a carbon copy.

Materials Needed:

1. Large envelope
2. Carbon paper
3. Second sheet

Procedures:

1. Type the two-page letter from page 217-218.
2. Type the letter from page 242 with one carbon copy. Ask your instructor to explain a carbon pack and the process for correcting on the carbon copy.
3. Look up "Copy Notation" in the letter section of one of the Office Reference Manuals to know where to type the copy notation on the letter. Mail the copy to your instructor.
4. Address a "real" envelope for the letter you typed in Item 3.
5. Fold the original letter by following the example on page 85 and insert the letter in the envelope - do not seal the envelope. Attach the envelope to the carbon copy.
6. Complete Skill Drive 4.
7. Staple all completed assignments behind this sheet and submit for grading.

Grading:

Time Writes (0-10 errors)

A	32+
B	27 - 31
C	22 - 26
D	17 - 21

Letters: All errors should be neatly corrected.

A	0 - 1
B	2 - 3
C	4
D	5
F	6 and RETYPE

Production Typing I
ASSIGNMENT SHEET NO. 3

Name __________________________
Period __________________________
Date Started ________________
Date Completed ________________
Grade ________________

Objectives: The student will be able to:

1. demonstrate the ability to appropriately format the following items:
    a. horizontally centered.
    b. vertically centered.
    c. columnar headings centered.
    d. appropriate spacing after each section.

Procedures:

1. Complete Skill Drive 5.
2. Type 114d from page 187 on a ½ sheet of paper. (Show your completed table to the instructor before continuing on with the next problem.)
3. Type from page 189 - 115c.
    Problem 1 double space and center on a ½ sheet.
    3 double space and center on a ½ sheet.
    4 follow directions in the book and center on a full sheet.
4. Complete Skill Drive 6.
5. Type from page 191 - 116c.
    Problems 1 and 2 are to be double-spaced and typed on a full sheet.
6. Type from page 193 - 117c, Problem 4 only.
    ½ sheet with short side up
    When the paper is inserted with the short side up, when you have __________ lines on the paper and the horizontal middle is ______.
7. Complete Progress Test 2.
8. Type from page 195 - 118c. Time yourself on this problem and include calculation and setting up time.

    Time Started __________ Time Finished __________

    Total Minutes Used __________

    241 ÷ ________ (minutes) = ________ gwpm
9. Staple all completed assignments behind this sheet and submit for grading.

Grading:

Time Writes (0-10 errors)

A	33+
B	28 - 32
C	23 - 27
D	18 - 22

Tables: All errors neatly corrected.
Each format error counts as 1.

A	0 - 1
B	2 - 3
C	4
D	5
F	6 and RETYPE

Production Typing I
ASSIGNMENT SHEET NO. 4

Name ______________________
Period ____________________
Date Started ______________
Date Completed ____________
Grade _____________________

Objectives: The student will be able to:

1. demonstrate the ability to appropriately format a boxed table.
2. demonstrate the ability to appropriately place leaders in a table.
3. review the objectives learned in Assignment Sheet No. 3.

Procedures:

1. Complete Skill Drive 6 - Reminder: that includes a five-minute time write, followed by speed or accuracy drill lines (approximately 15 minutes worth), and then another five-minute write on the same drive. All of this material, along with the yellow record sheet, must be submitted with this unit for grading.
2. Type 119c, Problems 2 and 3 from page 197.
3. Type Problem 1 from 120d on page 198. If you are not sure how to position the leaders (dots), please ask your instructor for help.
4. Type the boxed table from 121d on page 199. The vertical lines are drawn with the use of a pen with black ink and pulling the ratchet release lever towards you. This allows you to turn the cylinder knob without stopping for each line.
5. Complete Skill Drive 7.
6. Staple all completed assignments behind this sheet and submit for grading.
7. Ask the instructor for the TEST on tables.

Grading:

Time Writes (1-10 errors)

A	34+
B	29 - 33
C	24 - 28
D	19 - 23

Tables: All errors neatly corrected. Each format error counts as 1.

A	0
B	1 - 2
C	3 - 4
D	5
F	6

Production Typing I
ASSIGNMENT SHEET NO. 5

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

Objectives: The student will be able to:

1. demonstrate the ability to appropriately format reports/ manuscripts:
   - a. unbound.
   - b. leftbound.
   - c. bibliography.
   - d. title page.

Procedures:

1. Complete Skill Drive 9 - type one full page of drill work.
2. Type Problem 101d from pages 166-168. Type as an UNBOUND MANUASCRIPT
   Side Margins are 1" or 12 and 90+10 (bell) = 100
   First Page top margin is 2" or 12 lines
   Second page top margin is 1" or 6 lines
   Bottom margin on all pages is 1"
   Page Number on line 3 and space 90
   Manuscripts are usually DOUBLE SPACED
   Triple space after the main heading and before side headings
   When starting a new page or finishing a page, remember that at least two lines of a paragraph should be typed on the page if at all possible.
3. Complete Progress Test 3.
4. Type Problem 104c from pages 173-175. Type as a LEFTBOUND MANUSCRIPT.
   Side margins (1½" - 1") or 18 and 100
   All the rest the same as an unbound manuscript
5. Type the Bibliography page for the Choosing a Career Manuscript, which is Problem 108b, No. 1, on page 178.
6. Type the Title page for the manuscript, which is problem 108b, No. 2, on page 178. NO ERRORS ON THIS PAGE
7. Assemble typed pages for the leftbound report in correct order and staple as if leftbound.

Grading:

Time Writes (0-10 errors)	
A	35+
B	30 - 34
C	25 - 29
D	20 - 24

Manuscript Pages:	ALL errors neatly corrected
A	0
B	1
C	2 - 3
D	4

Production Typing I

ASSIGNMENT SHEET NO. 6

Name ______________________________

Period ______________________________

Date Started ______________

Date Completed ______________

Grade ______________

Objectives: The student will be able to:

1. demonstrate the ability to appropriately format:
    a. outlines.
    b. leftbound manuscript with tables.

Procedures:

1. Complete Skill Drive 10 - type one full page of drill work.
2. Type Problem 66d from page 106.
    Follow the directions given in the problem.
    Roman Numeral one is a capital "i" (I).
    Set left margin on 20.
3. Type Problem 67c from page 107 in outline form.
4. Complete Skill Drive 11 - type one full page of drill work.
5. Type Problem 145c from page 237 in leftbound manuscript form.
6. Type Assigment No. 28 from pages 262-264 in unbound manuscript form.
7. Complete Skill Drive 12 - type fone full page of drill work.
8. Staple all completed assignments behind this sheet and submit for grading.
9. Ask the instructor for the TEST on outlines and manuscripts.

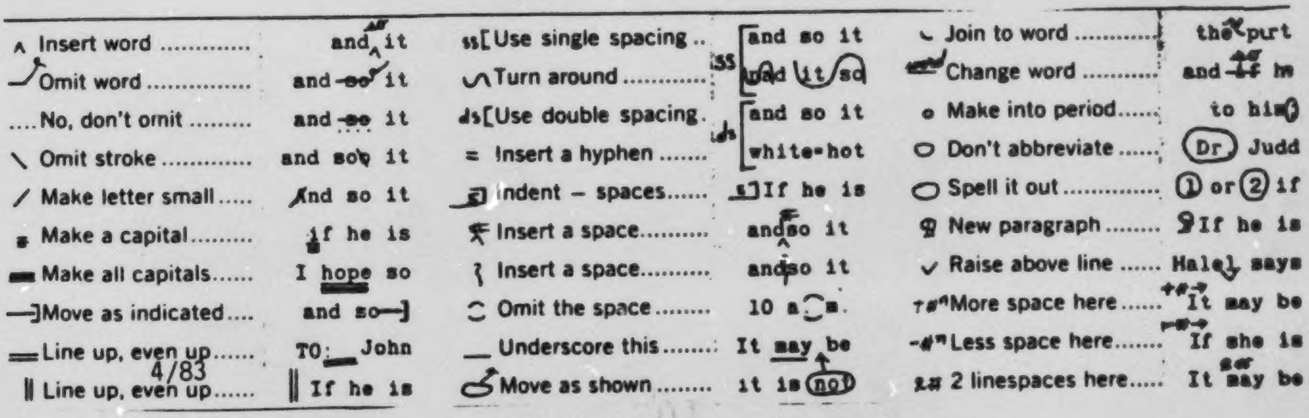
Grading:

Time Writes (0-10 errors)

A	35+
B	30 - 34
C	25 - 29
D	20 - 24

Manuscript Pages & Outlines: All errors neatly corrected.

A	0 - 1
B	2
C	3 - 4
D	5



Insert word	and it	Use single spacing	and so it	Join to word	the purt
Omit word	and so it	Turn around	and it so	Change word	and if he
No, don't omit	and so it	Use double spacing	and so it	Make into period	to him
Omit stroke	and so it	Insert a hyphen	white-hot	Don't abbreviate	Dr Judd
Make letter small	And so it	Indent — spaces	If he is	Spell it out	1 or 2 if
Make a capital	if he is	Insert a space	andso it	New paragraph	If he is
Make all capitals	I hope so	Insert a space	andso it	Raise above line	Hale says
Move as indicated	and so	Omit the space	10 a m.	More space here	It may be
Line up, even up	TO: John	Underscore this	It may be	Less space here	If she is
Line up, even up	If he is	Move as shown	it is not	2 linespaces here	It may be

4/83

Production Typing I
POST TEST

Name ____________________
Period ____________________
Date Started ______________
Date Completed ______________

MANUSCRIPTS

Objectives: To evaluate the student's ability to properly format:
a. outlines.
b. reports.
c. bibliographies.

Maximum Time Allowed:

2 class periods (100 minutes)

Procedures:

1. Type the outline on page 261, Problem No. 27.
2. Type the manuscript from page 117, Problem No. 72c in leftbound form.
3. Type a bibliography for Problem 72c.

Production Typing I

ASSIGNMENT SHEET NO. 7

Name ____________________

Period ____________________

Date Started ____________

Date Completed ____________

Grade ____________

Objectives: The student will be able to demonstrate the ability to appropriately format a memo.

Materials Needed:

Memo forms - 1-½ sheet
2-full sheets

Procedures:

1. Type Problem 129e from page 214 on the memo form provided.
    Margins on memos are usually 1"
    Remember to triple space after the subject line before typing the body of the memo
    Type your reference initials a double space below the body of the memo
2. Type Assignment 5 from page 216.
3. Type Problem 141d from page 232.
4. Complete Skill Drive 13.
5. Ask the instructor for the TEST on memos.

Grading:

Time Writes (0-10 errors)		Memos - ALL errors neatly corrected	
A	36+	A	0 - 1
B	31 - 35	B	2
C	26 - 30	C	3 - 4
D	21 - 25	D	5

INTEROFFICE COMMUNICATION

TO:

FROM:

DATE:

SUBJECT:

INTEROFFICE COMMUNICATION

TO:

FROM:

DATE:

SUBJECT:

Production Typing I
POST TEST

Name ______________
Period ______________
Date Started ______________
Date Completed ______________
Grade ______________

MEMOS

Objectives: To evaluate the student's ability to format memos appropriately.

Materials Needed:

Business Letter Typing, 3rd Edition, Casady and Casady
Memo forms

Maximum Time Allowed:

1 class period (55 minutes)

Procedures:

1. Type Job 64 from page 62.
2. Type Job 65 from page 62.

Production Typing I
ASSIGNMENT SHEET NO. 8

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

Objectives: The student will be able to demonstrate the ability to appropriately format on different forms.

Materials Needed:

1. Purchase order
2. Check
3. Invoice

Procedures:

1. Type the INVOICE from page 218, Assignment 7, on the invoice form.
2. Type the PURCHASE ORDER from page 252, Assignment 11, on the purchase order form.
3. Type the CHECK from page 253, Assignment 12, on the check form. No errors or corrections on the check part.
4. Complete Skill Drive 14.
5. Ask the instructor for the TEST on forms.

Grading:

Time Writes (0-10 errors)

A	37+
B	32 - 36
C	27 - 31
D	22 - 26

Forms - ALL errors neatly corrected

A	0
B	1
C	2
D	3

Enrichment activity: Invoices

[LM pp. 119, 121]

may be used after completing Lesson 135

Problem 1 [LM p. 119]
Invoice from script
prepare 1 cc; erase and correct errors

Calculat the totals.

SOLD TO: Modern Office Equipment Co.
6 South Tejon Street
Colorado Springs, CO 80903

DATE Current
OUR ORDER NO. 7380
CUST. ORDER NO. AB 20116
TERMS 2/10, n/30
SHIPPED VIA Intercity Express

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
5	Kik-step stool, retractable casters, enamel finish, assorted colors	26.10 ea.	
10	Mobile filing stool/casters, gray	20.10 ea.	
4	Posture-back stool, adjustable foam-filled vinyl seat and back, tan	104.50 ea.	

Problem 2 [LM p. 121]
Invoice from rough draft
prepare 1 cc; erase and correct errors

SOLD TO Camleback School
4299 East Camelback Road
Phoenix, AZ 85018

DATE Current
OUR ORDER NO. 7382
CUST. ORDER NO 138-RE-35
TERMS 2/10, n/30
SHIPPED VIA

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
2	M & M lc ~~P~~hotocopy stand/sliding panel doors, wood grain plastic top, black sides (32" × 18" × 26")	124.95 ea.	
5	Typing desk/shelf insert, tropic sand with walnut plastic top	130.70 ea.	
~~4~~ 3	Vertiflex mobile file (letter size)/bottom storage shelf, casters, tan	5~~5~~6.00 ea.	

112

phoenix distributors

700 East San Juan Avenue Phoenix, AZ 85014 (602) 774-3963

102
Invoice

Date

Our Order No.

Cust. Order No.

Terms

Shipped Via

Quantity	Description	Unit Price	Total

---

phoenix distributors

700 East San Juan Avenue Phoenix, AZ 85014 (602) 774-3963

Invoice

Date

Our Order No.

Cust. Order No.

Terms

Shipped Via

Quantity	Description	Unit Price	Total

SKILL DRIVE 1
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 2
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg.Lines ___

SKILL DRIVE 3
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg.Lines ___

PROGRESS TEST 1
Pretest ____(w) ____(e)
Post test ____(w) ____(e)

SKILL DRIVE 4
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 5
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 6
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

PROGRESS TEST 2
Prestest ____(w) ____(e)
Post test ____(w) ____(e)

SKILL DRIVE 7
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 8
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 9
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

PROGRESS TEST 3
Pretest ____(w) ____(e)
Post test ____(w) ____(e)

SKILL DRIVE 10
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 11
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 12
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 13
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 14
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 15
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

Name ______
Period ______
Date Started ______
Date Completed ______

PROGRESS TEST 5
Pretest ____(w) ____(e)
Post test ____(w) ____(e)

SKILL DRIVE 16
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 17
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 18
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

PROGRESS TEST 6
Pretest ____(w) ____(e)
Post test ____(w) ____(e)

SKILL DRIVE 19
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg.Lines ____

SKILL DRIVE 20
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 21
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

PROGRESS TEST 7
Pretest ____(w) ____(e)
Post test ____(w) ____(e)

SKILL DRIVE 22
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines _____
Accuracy Bldg. Lines ___

SKILL DRIVE 23
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accuracy Bldg. Lines ___

SKILL DRIVE 24
Pretest ____(w) ____(e)
Post test ____(w) ____(e)
Speed Bldg. Lines ______
Accurach Bldg. Lines ___

Name ____________
Period ____________
Date Started ____________
Date Completed ____________

OFFICE PROCEDURES

BASIC MINIMUM COMPETENCIES

Prerequisite: Advance and Production Typing
Credit: 1 per semester
Satisfies: 1 vocational credit per semester

The competencies listed below are for a one-year course. It is very difficult to break them into a semester group. Since this is to be the capstone of the administrative and service support program, several competencies are needed for its successful completion. It is assumed that the student has had at least one semester of typing. It should also be noted that students may be able to acquire some of these competencies in other courses. If they have not been acquired, however, it is necessary to incorporate them into the office procedures course. Office procedures includes such titles as office occupations, cooperative office education, office practices, administrative assistant, and secretarial procedures. Two curriculums, that of Clerical Office Procedures and Secretarial Office Procedures, will be discussed in detail.

After satisfactorily completing the course, the student will be able to:

1. employ effective job-search techniques, including:
    a. writing an application letter
    b. preparing a data sheet/resume
    c. completing an application form
    d. completing an employment test
    e. completing an interview (demonstrating appropriate appearance and self-confidence)
    f. following up on job-search procedures
2. identify careers utilizing office skills and describe applications of office skills to the careers identified.
3. describe the organization of tasks in a business office, including:
    a. interpretation of basic organization chart
    b. follow paper flow in a typical procedure, i.e. payroll
    c. set job priorities
4. plan and manage work flow, including:
    a. managing paper flow in a typical procedure, i.e. mail
    b. managing an appointment calendar (select from choices on how to)
    c. handling interruptions in work
5. apply the basic rules of alphabetic filing.
6. identify/describe/use the following filing systems:
    a. numeric
    b. geographic
    c. subject
    d. chronological
    e. color-coded
    f. tickler
7. identify filing supplies, including:
    a. folders
    b. labels
    c. microfiche
    d. microfilm

8. demonstrate techniques for handling incoming phone calls, including:
    a. answering promptly
    b. identifying self
    c. taking accurate and complete messages
    d. using "hold" effectively
    e. transferring calls
    f. demonstrating courtesy
    g. handling difficult situations
    h. using discretion in supplying information
9. demonstrate techniques for placing telephone calls, including:
    a. planning the call
    b. dialing correctly
    c. identifying self
    d. recognizing time zones
10. demonstrating techniques for processing incoming mail, including:
    a. date stamping
    b. checking for enclosures
    c. routing
11. demonstrate techniques for processing outgoing mail, including procedures relating to:
    a. classification
    b. special services
    c. ZIP code, zones
    d. sorting and presorting
12. compose simple business letters, including:
    a. order
    b. inquiry
    c. acknowledgement
    d. transmittal
    e. letter of resignation
13. demonstrate ability to exercise formating options.
14. prepare reprographic masters, including:
    a. spirit duplicator
    b. mimeograph
    c. others as available, including offset, thermal and photocopier
15. operate reprographic equipment, including:
    a. spirit duplicator
    c. mimeograph
    c. others as available
16. format properly for reprographics.
17. determine the appropriate reprographic process to use in a given situation.
18. identify equipment used in:
    a. filing
    b. reprographics
    c. outgoing mail processing
    d. incoming mail processing
    e. telephoning
    f. payroll processing
19. use reference materials including:
    a. work division manual
    b. dictionary
    c. ZIP code directory
    d. telephone directory
    e. thesaurus
    f. atlas
    g. equipment and supplies catalogs
    h. office manual
20. operate a ten-key keyboard using the touch system for:
    a. addition
    b. subtraction
21. follow procedures for preparing payroll, including:
    a. using data from time records
    b. calculating regular time payroll
    c. calculating overtime payroll
    d. calculating payroll according to salary
    e. calculating deductions
    f. preparing payroll checks

22. demonstrate correct procedures in handling transcription equipment.
23. transcribe accurately and fluently using transcribing equipment.
24. produce usable copy directly from transcribing equipment.
25. proofread keyboarded copy for:
    a. content
    b. grammar usage
    c. spelling
26. use proper error correction methods, including:
    a. correction fluid
    b. correction paper
    c. eraser
    d. self-correcting typewriter
    e. squeezing
    f. realignment
    g. spreading
27. identify application of or apply word processing concepts to:
    a. power keyboarding
    b. special equipment
    c. machine transcription
    d. office organization
28. define computer processing terminology, including:
    a. data
    b. input/output
    c. flow chart
    d. hardware
    e. software
    f. program
29. describe the nature and function of computer processing.
30. apply basic math skills required of all office workers to:
    a. extensions
    b. discounts
    c. percentages
    d. counting change
    e. balancing money
31. convert decimals to fractions.
32. convert fractions to decimals.
33. use basic business terminology, such as:
    a. invoice
    b. remittance
    c. collate
    d. debit/credit
    e. post
    f. balance
34. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    a. attendance
    b. punctuality
    c. good grooming
    d. honesty
    e. ability to handle criticism
    f. ability to handle rumors & gossip
    g. commitment to the job
    h. handling stress
    i. dependability
    j. discretely handling confidential information
    k. maintaining an organized work area
    l. exercising care in handling papers and using machines
    m. working in a team
    n. ethics

35. display growth and development in positive personal characteristics, including:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. fairness in dealing with others
    e. handling work with intertuptions
    f. initiative
    g. loyalty
    h. self-starter
    i. open-mindedness
    j. positive reinforcement
    k. positive thinking
    l. time managment
    m. economical use of materials and supplies
    n. self-confidence
    o. sense of humor
    p. tactfulness
    q. verbal, non-verbal expression
    r. keeping informed of employer's growth, needs and deadlines

36. identify the importance of self-evaluation and goal setting for improvement in performance on the job in areas such as:
    a. personality
    b. voice
    c. appearance
    d. attitude

37. practice appropriate business grooming in areas such as:
    a. dress
    b. hair care
    c. neatness and cleanliness
    d. posture
    e. health
    f. exercise

38. identify elements of office etiquette relating to:
    a. chain of command
    b. introductions
    c. manners
    d. social events within office

39. describe effect of business ethics, including:
    a. day's work for a day's pay
    b. absence and tardiness
    c. cost-consciousness
    d. internal theft
    e. deception
    f. employee's responsibility of working within organization's structure

40. identify factors which have an effect on public relations in and out of the office, including:
    a. representing the company outside the office
    b. handling visitors
    c. taking accurate messages
    d. maintaining the proper appearance
    e. practicing courtesy
    f. using titles or names appropriately

41. practice safe work habits, including:
    a. operating business machines
    b. using equipment - stapler, paper cutter, file cabinet, etc.
    c. avoiding hazards caused by loose clothing, jewelry, etc.
    d. using extension cords safely
    e. informing supervisor of unsafe working conditions
    f. complying with OSHA-WISHA

42. discuss survival skills, such as:
    - a. money management
    - b. use of credit
    - c. discretion in handling employee rights
    - d. laws covering employee rights
    - e. union or employee associations
    - f. income tax preparation
43. identify importance of activities that contribute to professional growth and development, including:
    - a. continuing education
    - b. attending professional business organizations
    - c. attending workshops and seminars
    - d. reading trade magazines
    - e. keeping informed of the employer's goals
    - f. communicating growth and potential for development within the organization
44. demonstrate leadership abilities in work situations, including:
    - a. independent problem-solving ability.
    - b. independent decision-making ability.
    - c. ability to plan, coordinate and implement plans requiring teamwork.
    - d. critiquing work of others and offering suggestions for improvement.
    - e. ability to lead group activities.
    - f. ability to delegate tasks and responsibilities.
    - g. ability to prioritize tasks.

Learner Outcomes:

1. Given 3 pieces of unprocessed, outgoing mail, the student will, within a 10-minute time period, be able to classify, ZIP code, sort and presort, and identify special service requirements.
2. Given an unarranged two-page program, the student will be able to format and type within a 20-minute period, a usable document for reproduction on reprographic equipment.

CLERICAL OFFICE PROCEDURES

CLERICAL OFFICE PROCEDURES

Objectives: The student will be aware of:

1. Mastery of basic office duties that have not been developed in earlier courses, such as: handling mail, filing, handling duplicating tasks, performing financial tasks, and meeting the public.
2. development of fully marketable skills at practical tasks, such as: typewriting, proofreading, and handling correspondence.
3. command of realistic job demands through experience with practical problems and tasks in simulated office situations.
4. self-confidence and maturity through attention to personal qualities that are esteemed in the world of work.
5. understanding of the nature of the office and its importance in the business world.
6. ability to work harmoniously with employers, co-workers, and the public.
7. awareness of employment opportunities in the business world for beginning positions and future careers.

Materials Needed:

Clerical Office Procedures, 6th Edition, Pasewark and Oliverio, Southwestern Publishing Company

Clerical Office Procedures
UNIT 1

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

THE MODERN OFFICE AND CAREER OPPORTUNITIES

Objectives: The student will be aware of the:

1. nature of clerical positions on the office worker's organization ladder.
2. tasks of clerical workers.
3. unique responsibilities of clerical workers as compared to other office workers.
4. how office functions are interrelated.

Materials Needed:

1. Typewriter
2. Dictionary and Word Division Manual
3. Typing paper
4. Message forms

Maximum Time Allowed:

6 days

Paper Headings:

Type your Name
Course Title   on the BACK of each page
Date

Head each assignment with the title and page number from the text.

Procedures:

1. Read pages 2-12.
2. Type the answers to the following assignments.
    a. Respond to "Reviewing Important Points", page 12.
    b. Respond to "Making Important Decisions", "Learning to Work with Others", page 13.
    c. "Improving Language Skills", page 13
    d. "Improving Arithmetic Skills" (done on sheet of paper showing work - not typed), page 14.
    e. "Demonstrating Office Skills", page 14.

Procedures:

3. Read pages 15-23.
4. Respond to "Reviewing Important Points", and "Making Important Decisions", page 23.
5. Respond to "Learning to Work with Others", "Improving Language Skills", page 28.
6. "Improving Arithmetic Skills", page 25 (show work)
7. "Demonstrating Office Skills", page 25.

Clerical Office Procedures
UNIT 2

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

APPLYING BASIC SKILLS

Objectives: The student will be aware of the importance of:

1. reading quickly and understanding what they read.
2. listening carefully and then remembering what they have heard.
3. writing legibly and correctly.
4. adding, subtracting, multiplying and dividing without error.

Materials Needed:

1. Typewriter
2. Pen
3. Pencil
4. Notebook paper
5. Typing paper
6. Dictionary and Word Division Manual

Maximum Time Allowed:

7 days
1 day for test

Procedures:

1. "Reviewing Important Points", page 37.
2. "Making Important Decisions", page 37.
3. Respond to "Learning to Work with Others", page 38.
4. "Improving Language Skills", pages 38-39.
5. Arithmetic Skills, page 39.
6. Demonstrating Office Skills (you may cut paper the necessary size - ask the teacher if you need help), page 40.
7. Read pages 41-46.
8. "Reviewing Important Points", page 46.
9. "Making Important Decisions", page 46.
10. "Learning to Work with Others", page 46.
11. "Improving Language Skills", page 47.
12. "Improving Arithmetic Skills", page 47 (show work).
13. "Demonstrating Office Skills", page 48-50.

14. Read pages 51-62.
15. Review Important Points, page 62.
16. "Making Important Decisions", page 63.
17. "Learning to Work with Others", page 63.
18. "Improving Language Skills", page 64
19. "Improving Arithmetic Skills", pages 64-65 (show work).
20. "Demonstrating Office Skills", pages 65-66.
21. Test 1

TEST 1

(Based on Units 1 and 2)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

Pasewark • Oliverio

South-Western Publishing Co.

Student ____________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	25	10	15	50
Student's Score				

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False." Item No. 0 is given as an illustration.

Answers — For Scoring

0. File clerks spend most of their time typing letters .... True [✓ False] 0. ✓

1. Clerical workers handle tasks that facilitate decision-making .... True False 1. ____
2. The modern office is not expected to change in the next 20 years .... True False 2. ____
3. Office workers often learn to do new tasks on the job .... True False 3. ____
4. A manager of administrative services is basically a secretary .... True False 4. ____
5. There are no basic competencies that all office workers need for initial employment .... True False 5. ____
6. Computing charges and payments for monthly billing statements is a data processing task .... True False 6. ____
7. Good file clerks retrieve materials quickly .... True False 7. ____
8. A single copy of most business papers is sufficient in the modern office .... True False 8. ____
9. Receptionists need to know a great deal about their organizations .... True False 9. ____
10. Few companies maintain inventories .... True False 10. ____
11. It is expected that there will be more clerical workers employed in the United States in 1985 than there were in 1975 .... True False 11. ____
12. The amount $4.4539 should be rounded to $4.46 .... True False 12. ____
13. Most clerical positions are filled by promotion within the company .... True False 13. ____
14. It is not wise to take time to read instructions before beginning a new task .... True False 14. ____
15. A desk dictionary is an unabridged dictionary .... True False 15. ____
16. It is not a good idea to summarize while listening to instructions .... True False 16. ____
17. Handwriting is an out-of-date skill .... True False 17. ____
18. Few clerical workers in modern offices process data .... True False 18. ____
19. Clerical workers seldom need to use the telephone .... True False 19. ____
20. Clerical workers are needed in all types of businesses .... True False 20. ____
21. Proficiency in reading, writing, and arithmetic is needed for efficient work in an office .... True False 21. ____
22. When standard procedures are used, it is likely that more errors will be made .... True False 22. ____
23. Standard procedures take more time to follow than procedures applying specifically to one task. True False 23. ____
24. If handwriting isn't legible, it is useless to waste time trying to read it .... True False 24. ____
25. The result of the multiplication process is called the dividend .... True False 25. ____

Score ________

SECTION B

INSTRUCTIONS: In each of the following sentences, select the phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the phrase selected. Item No. 0 is given as an example.

Answers — For Scoring

0. Clerical workers are needed in: (A) banks, (B) insurance companies, (C) hospitals, (D) all of the above .... D 0. ✓

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SECTION B (Continued)

Answers — For Scoring

1. To find the spelling of the plural form of a word, you would consult a/an: (A) dictionary, (B) English grammar book, (C) directory, (D) atlas .... ______ 1.______
2. The sum of 145, 34, 561, 69, and 7 is: (A) 796, (B) 816, (C) 2,236, (D) 2,436 .... ______ 2.______
3. If 69 is subtracted from 3,670, the difference is: (A) 2,580, (B) 3,601, (C) 2,236, (D) 2,436 .... ______ 3.______
4. The product of 456 and 21 is: (A) 1,368, (B) 8,476, (C) 8,676, (D) 9,576 .... ______ 4.______
5. If 45.153 and 31.18 are multiplied, the answer will have a decimal point: (A) at the end of the answer, (B) one place from the extreme right digit in the answer, (C) two places from the extreme right digit in the answer, (D) five places from the extreme right digit in the answer .... ______ 5.______
6. The clerical worker who would be most likely to work with figures is the: (A) transcribing machine operator, (B) receptionist, (C) accounting clerk, (D) file clerk .... ______ 6.______
7. To find out how productive you are as a typist, you might: (A) keep a record of how many letters you type each day, (B) think about how fast you type production jobs, (C) take a timed test during one period of your work day, (D) just mentally estimate your typewriting rate .... ______ 7.______
8. Productivity is likely to be low if: (A) office workers have good skills, (B) equipment is in good condition, (C) office workers do not have a thorough understanding of their responsibilities, (D) all of the above .... ______ 8.______
9. A common fringe benefit for office workers is: (A) vacations at company owned resorts, (B) vacations with pay, (C) leaves of absence, (D) both A and B .... ______ 9.______
10. An office worker shows courtesy by: (A) listening attentively to co-workers, (B) speaking softly but clearly, (C) greeting co-workers pleasantly, (D) all of the above .... ______ 10.______

Score ______

SECTION C

INSTRUCTIONS: Each of the statements below describes a *good* behavior or a *poor* behavior. If you think the behavior is good, underline or circle "Good"; if you think it is poor, underline or circle "Poor." Item No. 0 is given as an example.

Answers — For Scoring

0. The office worker writes all figures clearly .... [✓ Good] Poor 0. ✓

1. The office worker has no interest in learning about the goals of the business in which she is employed .... Good Poor 1.______
2. The office worker doesn't think about how much work he is doing each day .... Good Poor 2.______
3. The office worker introduces a new employee to the others in the office .... Good Poor 3.______
4. The office worker does her work slowly so that additional work is not given to her .... Good Poor 4.______
5. The office worker doesn't take time to be accurate since someone else will check his work .... Good Poor 5.______
6. The office worker resents change in the way tasks are done .... Good Poor 6.______
7. When an office worker has completed reading something that she should understand, she asks herself questions to check her understanding .... Good Poor 7.______
8. The office worker asks for a transfer when a new procedure is to be installed .... Good Poor 8.______
9. The office worker feels that his arithmetic skill can't be improved so he asks a fellow worker to do computations .... Good Poor 9.______
10. If an office worker can't read the handwritten copy from which she is typing, she stops typing and returns the page to the person who wrote it .... Good Poor 10.______
11. The office worker believes there is nothing that he can do to improve productivity in the office. Good Poor 11.______
12. The office worker gets to work promptly each morning .... Good Poor 12.______
13. The office worker asks a fellow worker to help with the spelling of an unfamiliar word .... Good Poor 13.______
14. The office worker believes that few office workers enjoy their work .... Good Poor 14.______
15. The office worker thinks that additional education would be a waste of time .... Good Poor 15.______

Score ______

Name ______________________
Period ______________________
Date Started ____________
Date Completed ____________
Grade ____________

PREPARING MAILABLE LETTERS

Objectives: The student will be able to:

1. type a business letter without having to stop and think where certain parts of the letter should be placed.
2. begin developing the ability to attractively place a letter on the page the first time they try it.
3. estimate the placement of letters and envelopes on their own without the aid of the placement table.
4. use the two letter abbreviation for all states.
5. locate proper ZIP Codes for a given address in the ZIP Code Directory.
6. recognize the different weights and qualities of stationery, carbon paper, and copy sheets as well as envelopes and postal cards.

Materials Needed:

1. Typing paper
2. Carbon paper
3. Envelopes
4. Four different weights of typing paper
5. Four different weights of copy paper
6. Four different weights of envelopes
7. Two different weights of carbon paper

} obtained by students in each class as a group assignment

Maximum Time Allowed:

14 days
1 day for test

Procedures:

1. Read pages 68-74 (Part I)
2. Review Important Points, page 74.
3. Important Decisions, page 74.
4. Working with Others, page 74.
5. Language Skills, pages 74-75.
6. Arithmetic Skills, page 75 (show work).
7. Office Skills, pages 75-76.

8. Read pages 77-88 (Part 2).
9. Important Points, page 88
10. Importance Decisions, page 88.
11. Working with Others, page 88.
12. Language Skills, page 89.
13. Arithmetic Skills, page 89 (show work).
14. Demonstrating Office Skills, pages 90-91.
15. Read pages 92-103 (Part 3).
16. Important Points, page 103.
17. Important Decisions, page 103.
18. Working with Others, page 104.
19. Language SKills, page 104.
20. Arithmetic Skills, pages 104-105.
21. Demonstrating Office Skills, pages 105-106.
22. Read pages 107-117 (Part 4).
23. Important Points, page 117.
24. Important Decisions, page 118.
25. Working with Others, page 118.
26. Language Skills, page 118.
27. Arithmetic Skills, page 119 (show work).
28. Demonstrating Office Skills, page 119.

TEST 2

(Based on Unit 3)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

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Student ____________________

Class ____________________ Sections ____________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	15	10	10	15	50
Student's Score					

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False."

	Answers	For Scoring
1. To emphasize a particular point, a postscript may be used	True False	1. ____
2. The recipient of a letter forms an impression of the letter before beginning to read it	True False	2. ____
3. If a name appears in the letterhead, it does not need to be typed in the complimentary close	True False	3. ____
4. The open style of punctuation requires punctuation marks at the ends of the special lines of the letter	True False	4. ____
5. The use of a standard line length for all letters saves time for the typist	True False	5. ____
6. Dictating and transcribing machines are used in most businesses today	True False	6. ____
7. Window envelopes save the office worker time	True False	7. ____
8. Stationery used for the second page of a letter should be the same quality as the letterhead	True False	8. ____
9. Titles (*Ms., Mr., Dr.,* etc.), the salutation, the complimentary close, and the formal signature are usually omitted from the interoffice memorandum	True False	9. ____
10. Most interoffice memorandum forms have the words *To, From, Date,* and *Subject* printed on them	True False	10. ____
11. The chief advantage of the interoffice memorandum is that it can be typed quickly	True False	11. ____
12. The salutation *Dear Sir* is used when a letter is addressed to a corporation	True False	12. ____
13. Letters look best when the side margins are even and the bottom margin is slightly wider than the side margins	True False	13. ____
14. The salutation is eliminated in the simplified letter style	True False	14. ____
15. The ZIP Code is typed between the names of the city and the state	True False	15. ____

Score ________

SECTION B

INSTRUCTIONS: Identify each part of a business letter given below in Column II by selecting one of the terms in Column I and writing its *letter* in the Answers column. Item No. 0 is given as an example.

COLUMN I

A. Attention line
B. Carbon copy notation
C. Complimentary close
D. Date line
E. Enclosure notation
F. Inside address
G. Mailing notation
H. Postscript
I. Reference initials
J. Salutation
K. Second page heading
L. Separate cover notation
M. Subject line
N. Typed signature and title

COLUMN II	Answers	For Scoring
0. Ladies and Gentlemen	J	0. ✓
1. (Mrs.) Carolyn Jacobs Administrative Assistant		1. ____
2. Martin and Lambert 3422 Clancey Street New York, NY 10027		2. ____
3. SUBJECT: Conserving Energy		3. ____
4. cc: Leslie Hartwell		4. ____
5. Martin and Lambert –2– September 2, 19––		5. ____
6. Sincerely		6. ____
7. Enclosures 2		7. ____
8. September 2, 19––		8. ____
9. Attention Mr. Frank G. Burton		9. ____
10. rb		10. ____

Score ________

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SECTION C

INSTRUCTIONS: Each statement below describes a *good* practice or a *poor* practice of an office worker. Indicate your decision on each by underlining or circling "Good" or "Poor" in each instance.

Answers — For Scoring

1. The office worker types the complimentary close two double spaces below the body of the letter .... Good Poor 1.____
2. The office worker indicates the number of enclosures after typing the word *Enclosures* .... Good Poor 2.____
3. The office worker types the inside address plus *Page 2* as the second page heading of a letter .... Good Poor 3.____
4. The office worker listens to special instructions before transcribing dictated material .... Good Poor 4.____
5. The office worker omits the ZIP Code from the inside address because it is not needed .... Good Poor 5.____
6. The office worker types special notations, such as PLEASE FORWARD in the lower left corner of the envelope .... Good Poor 6.____
7. The office worker types the second and succeeding pages of a letter on letterhead paper .... Good Poor 7.____
8. The office worker includes the title of a woman (*Ms., Mrs., Miss*) when typing her name in the inside address .... Good Poor 8.____
9. The office worker uses the two-letter state abbreviations with ZIP Codes .... Good Poor 9.____
10. The office worker uses the same quality of paper for all pages of a letter .... Good Poor 10.____

Score ________

SECTION D

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column the *letter* corresponding to the item selected.

Answers — For Scoring

1. In the block style letter, the date is typed: (A) beginning at the left margin, (B) beginning at the center of the page, (C) ending at the right margin, (D) centered .... ________ 1.____
2. In the mixed style of punctuation: (A) a colon is typed after both the salutation and the complimentary close, (B) a colon is typed after the salutation and a comma after the complimentary close, (C) a comma is typed after the salutation and the complimentary close, (D) a colon is typed after the complimentary close and a comma after the salutation .... ________ 2.____
3. A letter with less than 100 words would be classified as a: (A) short letter, (B) medium letter, (C) long letter, (D) two-page letter .... ________ 3.____
4. One characteristic of an interoffice memorandum is that: (A) it is not printed on a form, (B) it is sent outside the company, (C) it is an easy and quick way to communicate with other members of the company, (D) it is signed by the person writing it .... ________ 4.____
5. A blind carbon copy is shown by: (A) *bcc* on the original and copy, (B) *cc* on the original and *bcc* on the copy, (C) *bcc* on the copy only, (D) no notation at all .... ________ 5.____
6. The most timesaving punctuation style for the special lines of a letter is: (A) closed punctuation, (B) mixed punctuation, (C) partial punctuation, (D) open punctuation .... ________ 6.____
7. On an envelope, mailing notations should be typed: (A) centered on the envelope in all capital letters, (B) below the stamp in all capital letters, (C) below the return address in capital and lower case letters, (D) in the bottom left corner in capital and lower case letters .... ________ 7.____
8. The typed signature of the person writing the letter is typed: (A) on the second line below the complimentary close, (B) on the fifth line below the complimentary close, (C) on the fourth line below the complimentary close, (D) a double space below the complimentary close .... ________ 8.____
9. When typing the address on a legal size envelope, leave: (A) a one-inch top margin and a three-inch side margin, (B) a one-half inch top margin and a four-inch side margin, (C) a three and one-half inch top margin and a four-inch side margin, (D) a two and one-half inch top margin and a four-inch side margin .... ________ 9.____
10. A standard complimentary close for a business letter is: (A) Affectionately yours, (B) Faithfully yours, (C) Sincerely yours, (D) Yours .... ________ 10.____
11. Transcribed materials are usually returned to the dictator with: (A) the recording first, (B) a new indicator slip first, (C) all enclosures first, (D) the most urgent message first .... ________ 11.____
12. A short message that is typed on the second line below all other notations is a/an: (A) mailing notation, (B) postscript, (C) enclosure notation, (D) separate mail notation .... ________ 12.____
13. The inside address of a letter should be typed: (A) centered on the page, (B) even with the right margin, (C) at the left margin, (D) beginning at the center of the page .... ________ 13.____
14. When you insert a carbon pack in the typewriter, the shiny side of the carbon should be: (A) facing you, (B) facing away from you, (C) on the outside of the carbon pack, (D) facing the letterhead .... ________ 14.____
15. Letterhead paper should be used for: (A) all pages of a letter, (B) the first page of a letter only, (C) the carbon copy of the first page as well as the first page of the letter, (D) all pages of the carbon copy as well as all pages of the letter .... ________ 15.____

Score ________

Clerical Office Procedures

UNIT 4

Name ____________________

Period ____________________

Date Started ____________

Date Completed ____________

Grade ____________

TYPEWRITING REPORTS AND LEGAL PAPERS

Objectives: The student will be able to:

1. state the 8 steps from the original conception of the document to its typing in final form for distribution.
2. interpret proofreader's marks and other corrections made on original copy.
3. use the reference manual to answer questions concerning the format of business report typing.
4. explain the 12 parts of a business report.
5. provide an example of statistical tabulation typing.

Materials Needed:

1. Typewriter
2. Legal paper (from teacher)

Maximum Time Allowed:

14 days
1 day for test

Procedures:

1. Read pages 122-128 (Part 1).
2. Important Points, pages 128-129.
3. Important Decisions, page 130.
4. Working with Others, page 130.
5. Language Skills, pages 130-131.
6. Arithmetic Skills, page 131 (show work).
7. Demonstrating Office Skills, pages 131-132.
8. Read pages 133-146 (Part 2).
9. Important Points, page 146.
10. Important Decisions, pages 147-148.
11. Working with Others, page 148.
12. Language Skills, page 148.
13. Arithmetic Skills, page 149.
14. Demonstrating Office Skills, pages 149-151.

15. Read pages 152-159 (Part 3).
16. Important Points, page 159.
17. Important Decisions, page 159.
18. Working with Others, page 160.
19. Language Skills, pages 160-161.
20. Arithmetic Skills, page 161 (show work).
21. Demonstrating Office Skills, pages 161-163.
22. Read pages 164-172 (Part 4).
23. Important Points, page 172.
24. Important Decisions, page 172.
25. Working with Others, page 173.
26. Language Skills, page 173.
27. Arithmetic Skills, page 174.
28. Demonstrating Office Skills, pages 174-178.
29. Test 3

TEST 3

(Based on Unit 4)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

Pasewark • Oliverio

South-Western Publishing Co.

Student ______________________

Class ______________ Sections ________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	9	15	7	19	50
Student's Score					

SECTION A

INSTRUCTIONS: Indicate the proofreaders' mark to be used for each correction in Column II by writing in the Answers column the *letter* of the correct mark in Column I. Item No. 0 is given as an example.

COLUMN I

A.]
B. stet
C. ∮
D. ^
E. tr or ∽
F. [
G. ¶
H. ∨̓
I. no ¶
J. ≡ caps
K. ⁀

COLUMN II	Answers	For Scoring
0. Insert apostrophe	H	0. ✓
1. Paragraph		1.
2. Delete		2.
3. Leave it as it was		3.
4. Transpose		4.
5. Close up		5.
6. Move to right		6.
7. Capitalize		7.
8. Insertion to be made		8.
9. Move to left		9.

Score ________

SECTION B

INSTRUCTIONS: In each of the following sentences, insert in the Answers column the item that best completes the statement.

	Answers	For Scoring
1. A written declaration made under oath that the facts set forth are sworn to be true and correct is called a/an		1.
2. Vertical and horizontal margins for typed reports are determined by the		2.
3. The owners' share of business is called		3.
4. Symbols used to indicate corrections and revisions in rough drafts of reports are called		4.
5. The basic bookkeeping equation implied on a balance sheet is		5.
6. A legal document which provides for the distribution of property after death is called a/an		6.
7. The part of a report which tells the reader exactly what problem is going to be studied is the		7.
8. The part of a report which lists all references used in the report as well as references consulted which added substantiating information is called a/an		8.
9. The style of a title in which the first line is longer than the second, and the second line longer than the third is		9.
10. Omissions in a quotation are shown by typing		10.
11. Alternating spaces and periods are called		11.
12. When income is greater than expenses, you have a/an		12.
13. The time covered by a financial report is called the		13.
14. An agreement that can be enforced by law is called a/an		14.
15. The part of a report which lists all the topics that will be covered is the		15.

Score ________

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SECTION C

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the item selected.

Answers — For Scoring

1. A financial report which shows the progress of the business for the fiscal period stated in the heading is called a/an: (A) balance sheet, (B) income statement, (C) statement of retained earnings. ______ 1.______
2. If one part of a report outline is written as a complete sentence, the next part should be: (A) a sentence, (B) a phrase, (C) a word ...... ______ 2.______
3. The report which shows the financial condition of a company on a particular date is the: (A) balance sheet, (B) total assets, (C) income statement ...... ______ 2.______
4. In a report the summary is usually placed after the: (A) conclusion, (B) table of contents, (C) appendix ...... ______ 4.______
5. In legal documents numbers are usually written: (A) in words, (B) in both words and figures, (C) in figures ...... ______ 5.______
6. After the scope of the problem to be covered in a business report has been determined, the author prepares a/an: (A) appendix, (B) summary, (C) outline ...... ______ 6.______
7. On financial statements, double lines typed beneath a figure indicate: (A) addition or subtraction, (B) deletions of figures, (C) the final figure of a column ...... ______ 7.______

Score ______

SECTION D

INSTRUCTIONS: You will either agree or disagree with the accuracy of each of the following statements. If you agree, indicate your answer by either underlining or circling "Yes"; if you disagree, indicate your answer by either underlining or circling "No."

Answers — For Scoring

1. It is a good idea to make a carbon copy of a report in case the original is misplaced ...... Yes No 1.______
2. It is a good idea to number all pages of a report at the same time after the entire report has been typed ...... Yes No 2.______
3. When proofreading columns of figures, you should always read across the columns...... Yes No 3.______
4. The first draft of a report may be destroyed once you have typed the second draft ...... Yes No 4.______
5. The small Roman numeral *i* is typed on the title page of a report...... Yes No 5.______
6. Material may be quoted from a government publication without permission ...... Yes No 6.______
7. The periods in several lines of leaders should be in vertical alignment...... Yes No 7.______
8. Materials from other sources are frequently quoted in a business report to support the writer's point of view...... Yes No 8.______
9. Footnotes provide the reader with sources of additional information about the contents of the report ...... Yes No 9.______
10. More than one heading or subheading is required in each section of an outline ...... Yes No 10.______
11. Main headings are usually centered on the page...... Yes No 11.______
12. The three parts of a balance sheet are assets, liabilities, and capital ...... Yes No 12.______
13. All footnotes are double spaced ...... Yes No 13.______
14. There is only one way to write a report...... Yes No 14.______
15. You may X out material in the first draft of a report ...... Yes No 15.______
16. Side headings are used to indicate major divisions of the main topic...... Yes No 16.______
17. Typewritten legal documents are usually double spaced ...... Yes No 17.______
18. A second person should be asked to proofread an important report with the typist...... Yes No 18.______
19. A manuscript in its final form should be single spaced ...... Yes No 19.______

Score ______

Clerical Office Procedures
UNIT 5

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

MEETING THE PUBLIC

Objectives: The student will be able to:

1. state the importance of business manners and business speech in the interaction between clerical workers and the public.
2. recognize the essentials of successful person-to-person communicating.
3. demonstrate pleasant and considerate mannerisms when meeting the public.

Materials Needed:

1. Appointment sheets
2. Tape recorder and tape

Maximum Time Allowed:

6 days
1 day for test

Procedures:

1. Read pages 180-189 (Part 1).
2. Important Points, page 189.
3. Important Decisions, pages 189-190.
4. Working with Others, page 190.
5. Language Skills, 190-191.
6. Arithmetic Skills, page 191.
7. Demonstrating Office Skills, page 192.
8. Read pages 193-198 (Part 2).
9. Important Points, pages 198-199.
10. Important Decisions, page 199.
11. Working with Others, page 199.
12. Language Skills, page 200.
13. Arithmetic Skills, pages 200-201 (show work).
14. Demonstrating Office Skills, pages 201-202.
15. Demonstrating Office Skills (optional), page 202 (obtain the tape recorder and tape from the teacher).
16. Test 4

TEST 4

(Based on Unit 5)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

Pasewark • Oliverio

South-Western Publishing Co.

Student____

Class_________________________ Section__________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	25	15	10	50
Student's Score				

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False."

Answers — For Scoring

1. Receptionists should be able to answer from memory all questions asked by callers or visitors .. True False 1.____
2. When there is no visitor in the executive's office, the receptionist should assume that the executive is ready to receive a caller .... True False 2.____
3. A receptionist is expected to handle callers in a way that insures that the typing tasks will always be done on time .... True False 3.____
4. Receptionists are expected to be able to find information quickly in references maintained at the reception desk .... True False 4.____
5. A receptionist should ask a caller if he or she is likely to return before asking for the caller's address and telephone number .... True False 5.____
6. A record of callers aids in keeping track of who is waiting and who is still meeting with the executive .... True False 6.____
7. In general, the speech used in business is more informal than that used in ordinary personal conversations .... True False 7.____
8. The words *sight* and *site* are pronounced in the same way .... True False 8.____
9. The words *accept* and *except* are pronounced in the same way .... True False 9.____
10. Slang terms are used frequently in formal speech .... True False 10.____
11. Some words have more than one acceptable pronunciation .... True False 11.____
12. Dropping the endings of words is a common speech error .... True False 12.____
13. Business is seldom transacted through person-to-person meetings .... True False 13.____
14. Friendliness is not appropriate in a business office .... True False 14.____
15. Good manners can hide a receptionist's attitude of indifference .... True False 15.____
16. If a caller is rude, the receptionist should also be rude .... True False 16.____
17. Every caller should be given an appointment by the receptionist .... True False 17.____
18. A receptionist is expected to call the persons whose appointments must be canceled .... True False 18.____
19. All individuals who call at a business office come because they have made appointments .... True False 19.____
20. A receptionist greets someone who has an appointment in a way that shows she or he is expected .... True False 20.____
21. The receptionist represents both employer and company each time he or she meets and talks with a visitor to the office .... True False 21.____
22. The receptionist should introduce a new caller to the executive .... True False 22.____
23. The receptionist tries to make an unavoidable waiting period as pleasant as possible .... True False 23.____
24. A good speaker makes sure that every word is audible to the listener .... True False 24.____
25. Standard language does not change over time .... True False 25.____

Score ______

SECTION B

INSTRUCTIONS: You are to determine if each statement reflects *good* behavior or *poor* behavior of a receptionist. If you think the behavior is good, indicate your answer by either underlining or circling "Good"; if you think it is poor, indicate your answer by underlining or circling "Poor."

Answers — For Scoring

1. The receptionist knows company policies .... Good Poor 1.____
2. When the receptionist must be away from the desk, arrangements are made for a replacement .. Good Poor 2.____
3. The receptionist speaks in a very low voice .... Good Poor 3.____
4. The receptionist grows angry when an unfamiliar caller insists on an immediate appointment, but won't reveal his or her name .... Good Poor 4.____

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SECTION B (Continued)

Answers   For Scoring

5. The receptionist, knowing that the executive will eventually learn about a new caller, does not ask for the caller's address and telephone number .... Good Poor 5.____
6. The receptionist promises a caller who refuses to give her name and the nature of her business that if she writes a letter to the executive, she will be sure to get an appointment .... Good Poor 6.____
7. The receptionist grows impatient when a caller asks more than one question when other people are waiting to be serviced .... Good Poor 7.____
8. The receptionist maintains reference materials in orderly fashion at the desk .... Good Poor 8.____
9. The receptionist doesn't waste time checking to see who has the next appointment .... Good Poor 9.____
10. The receptionist tells a caller who is in the wrong office that he should return to the first floor and check the directory .... Good Poor 10.____
11. The receptionist reads carefully the agenda of company activities for the week .... Good Poor 11.____
12. The receptionist lets a caller take the only copy of a reference booklet with her when she goes into the executive's office .... Good Poor 12.____
13. The receptionist keeps the file of callers up to date .... Good Poor 13.____
14. The receptionist keeps a list of telephone numbers that would be helpful in the event of an emergency .... Good Poor 14.____
15. A code that only the receptionist can understand is used to record appointments on the master calendar maintained at the reception desk .... Good Poor 15.____

Score ____

SECTION C

INSTRUCTIONS: In each of the following sentences, select the phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the item selected.

Answers   For Scoring

1. A caller approaches the reception desk where the receptionist is busy typing. The receptionist should: (A) continue to type until the page is completed, (B) stop typing, look up immediately, and say, "Good morning," (C) look up immediately and say, "Would you wait just a minute while I finish this page?" (D) continue to type and, not looking up, ask, "Did you want to see someone?" .... ____ 1.____
2. Mannerisms in the business office are: (A) a distraction from clear communication, (B) a valuable aid in conveying the exact meaning of what you are saying, (C) a means of maintaining individuality in communications, (D) useful when ordinary words don't seem to convey the full meaning of what is being stated .... ____ 2.____
3. The caller's first impression of the receptionist is largely related to the way in which the receptionist: (A) typewrites, (B) arranges flowers, (C) takes dictation, (D) speaks .... ____ 3.____
4. Most general rules for handling callers must be applied with an awareness that: (A) they must never be broken, (B) they really don't apply to people that the receptionist likes, (C) they will not serve some situations from time to time, (D) they reflect the fact that visitors interrupt the work of the office .... ____ 4.____
5. When an unfamiliar caller approaches the reception desk, the receptionist should say: (A) "Who are you, please?" (B) "Good morning, may I help you?" (C) "Good morning. You don't by any chance have an appointment, do you?" (D) "Hi! Am I supposed to know you?" .... ____ 5.____
6. The use of slang in the office: (A) gives an informal, friendly tone to one's conversation, (B) can inhibit clear communication, (C) reflects an awareness of the language of the day, (D) reflects a young, alive personality .... ____ 6.____
7. The receptionist's response to a caller who asks to see Mr. Hill who is busy should be: (A) "You didn't make an appointment, so I don't really know if I should help you." (B) "Mr. Hill doesn't really feel like seeing anyone this morning. Can you come back later?" (C) "I'm very sorry, but Mr. Hill is in a meeting. Could I arrange an appointment for another time?" (D) "Mr. Hill is busy, and I don't know whether you should wait because I don't know what he will want to do when this meeting is over." .... ____ 7.____
8. The receptionist should be as gracious and sincere when bidding a visitor goodbye as when saying hello: (A) if the caller did not overstay his or her appointment, (B) if the executive seems to have gotten along well with the caller, (C) no matter how or when the appointment ends, (D) if the receptionist is not busy with other office work .... ____ 8.____
9. A person is said to have an affected way of speaking when he or she: (A) speaks in a manner that is not natural, (B) speaks slowly and cautiously, (C) speaks naturally and easily, (D) speaks louder than is necessary .... ____ 9.____
10. Ms. Royer arrives early for her appointment; the receptionist should: (A) tell her that she is too early, and invite her to take a walk around the building, (B) ask her to be seated and tell her when she can expect to see the executive, (C) ask her to be seated and sit down near her to make conversation while she waits, (D) ignore her until it is time for her appointment .... ____ 10.____

Score ____

Clerical Office Procedures
UNIT 6

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

USING COMMUNICATION SERVICES

Objectives: The student will be able to:

1. discuss the differences between postal service and messages sent by telephone, telegram, or Telex equipment.
2. discuss procedures for handling incoming calls in a business office.
3. discuss proper methods of taking telephone messages.

Materials Needed:

1. Tape recorder and tape
2. Message forms
3. Typing paper

Maximum Time Allowed:

10 days
1 day for test

Procedures:

1. Read pages 204-212 (Part 1).
2. Important Points, page 212.
3. Important Decisions, pages 212-213.
4. Working with Others, page 213.
5. Language Skills, page 213.
6. Arithmetic Skills, page 214.
7. Demonstrating Office Skills, pages 215-216.
8. Read pages 217-223 (Part 2).
9. Important Points, pages 223-224.
10. Important Decisions, page 224.
11. Working with Others, page 224.
12. Language Skills, page 225.
13. Arithmetic Skills, page 225 (show work).
14. Demonstrating Office Skills, page 227 (situation #2).

15. Read pages 228-234 (Part 3).
16. Important Points, page 234.
17. Important Decisions, pages 234-235.
18. Working with Others, page 235.
19. Language Skills, page 235.
20. Arithmetic Skills, page 236.
21. Demonstrating Office Skills, page 237.
22. Read pages 238-248 (Part 4).
23. Important Points, page 248.
24. Important Decisions, page 249.
25. Working with Others, page 249.
26. Language Skills, pages 249-250.
27. Arithmetic Skills, page 250.
28. Demonstrating Office Skills, page 251.
29. Test 5.

TEST 5

(Based on Unit 6)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

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Student____________________

Class____________________ Sections__________ 130

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	10	20	10	10	50
Student's Score					

SECTION A

INSTRUCTIONS: Identify each of the definitions given in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column. Item No. 0 is given as an example. No answer is used more than once.

COLUMN I

A. Bellboy
B. Call Director
C. Card Dialer
D. Collect call
E. Credit card call
F. DDD
G. Mobile telephone
H. PBX
I. Conference call
J. Speakerphone
K. Teletype
L. TWX
M. WATS

COLUMN II	Answers	For Scoring
0. Radio telephone for cars, buses, taxicabs, planes, trains	G	0. ✓
1. Makes it possible to get a party without the need to dial manually	______	1.____
2. A way of placing all station-to-station calls	______	2.____
3. A personal signaling service	______	3.____
4. Teletypewriter exchange service which operates through a Western Union service	______	4.____
5. Free telephone service to customers	______	5.____
6. Permits an attendant to answer many calls at one location	______	6.____
7. A small switchboard that aids in handling telephone calls	______	7.____
8. Caller's voice comes from a small loudspeaker on the desk	______	8.____
9. Convenient way to make and charge long-distance calls when traveling	______	9.____
10. Call for which you want the station or person called to pay the charges	______	10.____

Score ________

SECTION B

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Is it possible to get an impression of a person from his or her voice and speech?	Yes No	1.____
2. Is it possible to improve your telephone voice and speech?	Yes No	2.____
3. To save time is it a good idea to speak rapidly during a business telephone conversation?	Yes No	3.____
4. Does a high-pitched voice carry better over a telephone than a low-pitched voice?	Yes No	4.____
5. Since two people cannot see each other while talking by telephone, is it necessary to be courteous?	Yes No	5.____
6. Do all companies require that calls be screened?	Yes No	6.____
7. Do most companies forbid all personal calls?	Yes No	7.____
8. Is an office worker saving time by just remembering a telephone message rather than writing it out?	Yes No	8.____
9. Should a caller who reached the wrong office be told the right extension and asked to dial over again?	Yes No	9.____
10. If a call is disconnected, should the person who received the call place the call again?	Yes No	10.____
11. Is automatic equipment needed in order to transfer calls from one office to another office?	Yes No	11.____
12. Is a Mailgram more expensive than a full-rate telegram?	Yes No	12.____
13. Is the United States divided into three time zones: Eastern, Central, and Pacific?	Yes No	13.____
14. Is there equipment that permits direct dialing of extensions within a company?	Yes No	14.____
15. Is a PBX system one that can receive incoming calls only?	Yes No	15.____
16. Is it necessary to dial the prefix 1 in some areas of the United States in order to get a long-distance line?	Yes No	16.____
17. Is it necessary to give the operator the name of the person you are calling in a station-to-station call?	Yes No	17.____
18. Is it possible to send money via telegram?	Yes No	18.____
19. Are ordinary punctuation marks in a domestic telegram charged for when they are transmitted?	Yes No	19.____
20. Can only plain language be used in sending radiograms to and from ships at sea?	Yes No	20.____

Score ________

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SECTION C

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column the *letter* corresponding to the item selected.

Answers | For Scoring

1. The Yellow Pages of a telephone directory classifies businesses alphabetically: (A) by address, (B) by name, (C) by product or service, (D) by location .... ________ 1.____
2. The quickest and least expensive type of toll call is the: (A) station-to-station call, (B) person-to-person call, (C) conference call, (D) express call .... ________ 2.____
3. The office assistant to Richard K. Michaels of the National Business Display Company should answer a direct outside call with: (A) "National Business Display Company," (B) "National Business Display Company, Mr. Michaels' office," (C) "Mr. Michaels' office," (D) "Good morning, National Business Display Company .... ________ 3.____
4. A term adopted to designate telephone calls dialed by telephone subscribers without operator assistance to points outside their local or extended service area is: (A) TWX, (B) DDD, (C) TAS, (D) TSS .... ________ 4.____
5. A telephone set with push buttons instead of a rotary dial is a: (A) Button-push, (B) Call Director, (C) Bellboy, (D) Touch-Tone telephone .... ________ 5.____
6. If you are working in an office in San Francisco and want to call a business firm in Philadelphia that closes at 5 p.m., you should not place your call after: (A) 2 p.m., (B) 3 p.m., (C) 4 p.m., (D) 5 p.m .... ________ 6.____
7. A Touch-Tone automatic dialer which combines the features of a six-key telephone and a magnetic tape dialer is a: (A) Touch-A-Matic, (B) Call Director, (C) Card Dialer, (D) Call-A-Matic........ ________ 7.____
8. To reach an out-of-town information operator, dial the proper area code, then: (A) 637-1212, (B) 936-1212, (C) 555-1212, (D) 666-1212 .... ________ 8.____
9. In a business office the telephone should be answered at the end of the: (A) first ring, (B) second ring, (C) third ring, (D) fourth ring .... ________ 9.____
10. The post office in Elizabeth, New Jersey, which is in Union County, is listed in the alphabetic telephone directory (white pages) under the general heading: (A) Elizabeth, City of, (B) Union, County of, (C) New Jersey, (D) United States Government........ ________ 10.____

SECTION D

INSTRUCTIONS: In each of the following sentences, insert in the Answers column the item that best completes the statement.

Answers | For Scoring

1. To find information about how to make an overseas call, you would consult... ________________ 1.____
2. To find the name of a company that sells carpeting for commercial offices, you would consult........ ________________ 2.____
3. To find the area code for a city you are calling for the first time, you would consult .... ________________ 3.____
4. You are looking at this listing in the local telephone directory:

   McKee Arthur G. & Co.
   Executive Offices........674-9000
   Process machinery Div........674-9432
   Western Knapp Div........674-9337

   To talk with someone in the personnel department, you would dial the number .... ________________ 4.____
5. Using the information given in Question 4, if you were an employee in the personnel department of the G. Arthur McKee Company and wanted to talk to someone in the Western Knapp Division, you would dial .... ________________ 5.____
6. A hotel that wants customers to be able to make reservations without having to pay for long-distance calls uses the service called .... ________________ 6.____
7. In order to talk with four people in various parts of the United States, an executive could request a/an .... ________________ 7.____
8. An international telegraph service that is like a letter telegram is called a .... ________________ 8.____
9. When just a few letters of the alphabet stand for a whole statement, the message is in the form of a........ ________________ 9.____
10. The charge made for an out-of-town call depends upon four factors: the type of call, the distance, the time of day, and .... ________________ 10.____

Score ______

Clerical Office Procedures
UNIT 7

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

FILING RECORDS IN THE OFFICE

Objectives: The student will be:

1. aware of the importance of systematic records control for the "memory" of a business.
2. aware that if business should lose their records through some disaster they may be faced to go out of business.
3. able to use the rules for alphabetic indexing of personal names.
4. able to use the rules for alphabetic filing of business firms and other organizations.
5. aware of the different filing equipment and supplies.
6. aware of the standard rules for filing may change to improve the system.

Materials Needed:

1. 3" X 5" blank filing cards (200)
2. 7½" X 10½" manila envelopes
3. Filing Procedures Filmstrip and Summary Sheet

Maximum Time Allowed:

14 days

Procedures:

1. Read pages 254-259 (Part 1).
2. Important Points, pages 259-260.
3. Important Decisions, page 260.
4. Working with Others, page 260.
5. Language Skills, pages 260-261.
6. Arithmetic Skills, page 261.
7. Demonstrating Office Skills, pages 261-262.
8. Read pages 263-270 (Part 2).
9. Important Points, page 270.
10. Important Decisions, page 270.
11. Working with Others, page 271.
12. Language Skills, page 271.
13. Arithmetic Skills, page 271.
14. Demonstrating Office Skills, pages 272-273.

15. Read pages 274-288 (Part 3).
16. Important Points, page 288.
17. Important Decisions, page 289.
18. Working with Others, page 289.
19. Language Skills, page 289.
20. Arithmetic Skills, page 289 (show work).
21. Demonstrating Office Skills, page 290-295.
22. Read pages 296-305 (Part 4).
23. Important Points, page 306.
24. Important Decisions, page 306.
25. Working with Others, pages 306-307.
26. Language Skills, page 307.
27. Arithmetic Skills, page 307 (show work).
28. Demonstrating Office Skills, pages 307-308.

Clerical Office Procedures

REVIEW SHEET

Name ____________________

Period ____________________

Date Started ____________

Date Completed ____________

Grade ____________

FILING PROCEDURES

Directions: Watch the film strip on the above topic. Take notes on the following items. Take your notes on a separate piece of paper and then transcribe your notes on this paper at the typewriter. Be sure to correct all your errors.

IF FILES ARE TO BE HELPFUL TO A BUSINESS, THEY MUST HAVE THE FOLLOWING FOUR ITEMS FOUND IN THE SYSTEM.

WHO WOULD DO THE FILING IN DIFFERENT SIZE COMPANIES?

WHAT FUNCTIONS MUST THE PEOPLE IN CHARGE OF FILING COMPLETE?

WHAT IS REQUIRED TO PREPARE MATERIALS FOR FILING?

CODING FOR LETTERS: HOW AND WHERE -

A. ORIGINAL -

B. CARBON COPY -

C. SUBJECT FILING -

D. NUMERIC FILING -

E. GEOGRAPHIC -

THREE THINGS YOU MUST KNOW TO PROPERLY SORT AND ARRANGE A FILE.

WHERE SHOULD YOU TYPE ON A GUMMED LABEL?

PREPARE AN INDIVIDUAL FOLDER FOR CORRESPONDENCE WITH AT LEAST ________ NUMBER OF ITEMS FOR FILING.

HOW SHOULD YOU FILE WITHIN A FOLDER?

WHAT ARE "GUIDES" ON A FILE?

WHO SHOULD REMOVE ARTICLES FROM THE FILES?

EXPLAIN A FILE REQUEST FORM.

EXPLAIN A FILE INDEX FORM.

WHAT IS AN OUT FILE FOLDER?

WHY IS A CROSS REFERENCE SHEET USED IN FILING?

RECORDS ARE USED WITHIN ____________________ WEEKS AFTER RECEIVING THE ITEM.

RECORDS SHOULD BE MOVED AT THE END OF ____________ YEAR(S) TO TRANSFER FILES.

EXPLAIN A TRANSFER FILE.

HOW AND WHEN SHOULD A BUSINESS DISPOSE OF RECORDS?

Clerical Office Procedures
UNIT 8

Name ______________
Period ______________
Date Started ______________
Date Completed ______________
Grade ______________

RECORDS MANAGEMENT IN THE OFFICE

Objectives: The student will be able to:

1. discuss the meaning of records management.
2. discuss steps in proper filing procedures.
3. sort correspondence for filing.
4. index by subject, numeric and geographic filing systems.

Materials Needed:

1. Folder labels
2. 3" X 5" cards (100)

Maximum Time Allowed:

10 days
1 day for test

Procedures:

1. Read pages 310-319 (Part 1).
2. Important Points, pages 319-320.
3. Important Decisions, page 320.
4. Working with Others, page 320.
5. Language Skills, pages 320-321.
6. Arithmetic Skills, page 321.
7. Demonstrating Office Skills, pages 321-324.
8. Read pages 325-332 (Part 2).
9. Important Points, page 332.
10. Important Decisions, page 332.
11. Working with Others, page 332.
12. Language Skills, page 332.
13. Arithmetic Skills, page 333.
14. Demonstrating Office Skills, pages 333-334.
15. Read pages 335-349 (Part 3).
16. Important Points, page 349.

17. Important Decisions, page 350.
18. Working with Others, page 350.
19. Language Skills, page 350.
20. Arithmetic Skills, page 351.
21. Demonstrating Office Skills, pages 351-352.
22. Read pages 353-364 (Part 4).
23. Important Points, pages 364-365.
24. Important Decisions, page 365.
25. Working with Others, page 365.
26. Language Skills, pages 365-366.
27. Arithmetic Skills, page 366.
28. Demonstrating Office Skills, page 367.
29. Test 6.
30. Mid-Term Examination

TEST 6

(Based on Units 7 and 8)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

Pasewark • Oliverio

South-Western Publishing Co.

Student ____________________

Class ____________________ Sections __________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	15	10	10	15	50
Student's Score					

SECTION A

INSTRUCTIONS: Identify each item given below in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column.

COLUMN I

A. Alpha-numeric plan
B. Card tickler file
C. Elevator file
D. Cross reference
E. Geographic file
F. Hard copy
G. Individual folder
H. Micrographics
I. Numeric file
J. Out guide
K. Primary guide
L. Random file
M. Release mark
N. Requisition card
O. Rotary file
P. Shelf file
Q. Signals
R. Subject file

COLUMN II	Answers	For Scoring
1. Form filled out by a person who borrows materials from a file	______	1. ____
2. Filing system especially appropriate for filing stock and inventory records, requisitions, purchase orders, sales orders, contracts, projects, jobs, cases, licenses, credit card accounts	______	2. ____
3. Power-driven filing equipment with trays arranged on shelves that can be brought to the working level of the operator	______	3. ____
4. File in which cards have strips of metal teeth attached to the bottom edges of the cards making keyboard selection of cards possible	______	4. ____
5. Filing system designed around the concerns of a business	______	5. ____
6. A follow-up file consisting of 12 monthly primary guides and 31 secondary guides	______	6. ____
7. Sheet inside a folder that says a paper is filed elsewhere	______	7. ____
8. Filing system having major sections of the country as primary guides	______	8. ____
9. System whereby exact copies of valuable records can be reproduced in miniature	______	9. ____
10. Sheet of pressboard used when an entire folder is removed	______	10. ____
11. Notation which serves as the file clerk's authority to file a business document	______	11. ____
12. Sheet of pressboard used to indicate a major division of a filing system	______	12. ____
13. Term referring to a photocopy of microfilmed material	______	13. ____
14. Little pieces of metal or plastic, usually colored, that are placed on records in visible files to indicate certain classifications	______	14. ____
15. Folder prepared when six pieces of filed material to, for, or about one person or subject have accumulated in the miscellaneous folder	______	15. ____

Score ______

SECTION B

INSTRUCTIONS: For each of the following names, select the *second* indexing unit. Write that unit in the Answers column at the right of the name. Item No. 0 is given as an example.

	Answers	For Scoring
0. Ye Olde Antique Shoppe	*Olde*	0. ✓
1. Deckelman's Locksmiths	______	1. ____
2. Beverly's Beauty Salon	______	2. ____
3. Petersen-Bartlett Investigations	______	3. ____
4. Mrs. Michael (Beth) Hime	______	4. ____
5. La Fonda Restaurant	______	5. ____
6. First National Bank, Seattle	______	6. ____
7. S and L Sewing Center	______	7. ____
8. Hotel Marquis	______	8. ____
9. Haskins County Farm Bureau	______	9. ____
10. E-Z-Find Thrift Shop	______	10. ____

Score ______

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SECTION C

INSTRUCTIONS: Indicate the correct indexing order of the three names by writing the letters A, B, and C in parentheses before the names. Write in the Answers column the *letter* that you placed before the last name. Item No. 0 is given as an example.

	Answers	For Scoring
0. (*A*) J. H. Sharon (*C*) John W. Steger (*B*) Chester C. Staats	*B*	0. ✓
1. ( ) Cross Roads Beauty Bar ( ) Cross Bar Health Retreat ( ) Hotel Crossroads		1.
2. ( ) Lonnie J. MacCasland ( ) Travis G. McCaslin ( ) Timothy M. McCasland		2.
3. ( ) Alton Candy Counter ( ) A-1 Kindergarten ( ) James Conrad Alton		3.
4. ( ) Ervin C. Roberts ( ) Karen Roberts ( ) Brenda (Mrs. W. P.) Roberts		4.
5. ( ) Silas Mathews ( ) Sarah Matthews ( ) Samuel Mathis		5.
6. ( ) REA Business College ( ) Read-A-Lot Book Store ( ) Harold O'Reade		6.
7. ( ) Young's Department Store, Atlanta, Georgia ( ) Young's Department Store, Savannah, Georgia ( ) Young's Department Store, Athens, Georgia		7.
8. ( ) Kirby-Haynes Realtors ( ) Rita N. Kirbey, M.D. ( ) Kirbey Litho & Printing		8.
9. ( ) Hancock Fabric Store ( ) Lee J. Hancock ( ) Preston R. Hance		9.
10. ( ) Wilson's Distributors ( ) Wilkins Supply Center ( ) Wilson's Warehouse		10.

Score ______

SECTION D

INSTRUCTIONS: The answer to each of the questions below is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Are all records considered essential to the operation and growth of an organization classified as useful records?	Yes No	1.
2. Is the only part of a man's name that a woman may legally assume upon marriage his last name?	Yes No	2.
3. Are numbers read from right to left in a terminal-digit file?	Yes No	3.
4. Is formulation of a records rentention schedule a primary responsibility of the office worker?	Yes No	4.
5. Are photocopies sometimes made as an alternative to cross-referencing?	Yes No	5.
6. In individual folders are letters arranged by date with the most recent letter in back?	Yes No	6.
7. If a particular document is difficult to retrieve, should it be cross-referenced when it is finally found?	Yes No	7.
8. In a "special" folder in an alphabetic file, are the records arranged alphabetically by name and then by date within the group of names?	Yes No	8.
9. Are carrier folders ordinarily easy to identify?	Yes No	9.
10. Is microfilming appropriate for most company correspondence?	Yes No	10.
11. Do numeric, geographic, and subject files make use of supplementary card files for quick retrieval of records?	Yes No	11.
12. Should a miscellaneous folder be kept for every alphabetic primary guide?	Yes No	12.
13. Is the process of determining how a document is to be filed called coding?	Yes No	13.
14. Should a file drawer be filled to its capacity?	Yes No	14.
15. Is one month an appropriate charge-out period?	Yes No	15.

Score ______

MIDTERM EXAMINATION

(Based on Units 1 through 8)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

Pasewark • Oliverio

South-Western Publishing Co.

Student____

Class_________________________ Section_________

SCORING RECORD	SCORES BY SECTION					TOTAL
	A	B	C	D	E	
Maximum	20	25	15	15	25	100
Student's Score						

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling either "Yes" or "No" in the Answers column.

	Answers	For Scoring
1. Should names of states always be written out when ZIP Codes are used?	Yes No	1.____
2. Is the simplified letter style considered a timesaving style?	Yes No	2.____
3. Can letters of various length be typed using the same line length?	Yes No	3.____
4. Is the interoffice memorandum used for correspondence with the customers of a company?	Yes No	4.____
5. Do some typists who transcribe dictation from transcribing machines work in centralized word processing centers?	Yes No	5.____
6. Should the typist type *bcc* on the original copy of a letter?	Yes No	6.____
7. Are cord switchboards used in large businesses where many telephone lines are needed?	Yes No	7.____
8. Can material from government publications be quoted without permission?	Yes No	8.____
9. Are office workers needed in all types of organizations?	Yes No	9.____
10. Can an office worker learn a great deal about his or her job by reading?	Yes No	10.____
11. Is reading to get an overview of the material a waste of valuable time?	Yes No	11.____
12. Do clerical workers seldom use the telephone?	Yes No	12.____
13. Can an office worker become a notary public?	Yes No	13.____
14. Does a Dataphone provide a way for computers to "talk" to other computers?	Yes No	14.____
15. Is a dictionary helpful in learning the synonyms for a word?	Yes No	15.____
16. Should the typist carefully correct mistakes on the first draft of a report?	Yes No	16.____
17. Is the main body of a report where information is presented and analyzed?	Yes No	17.____
18. Should an office worker strive for a telephone voice that "smiles"?	Yes No	18.____
19. Do person-to-person calls cost less than station-to-station calls?	Yes No	19.____
20. Are tax records classified as vital records?	Yes No	20.____

Score ______

SECTION B

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False."

	Answers	For Scoring
1. Most workers must share their desks with other office workers	True False	1.____
2. A good listener tries to grasp the thought conveyed by the speaker's words	True False	2.____
3. A slanted style of handwriting is considered a poor style	True False	3.____
4. A telegraphic money order is one of the quickest and safest ways to send money	True False	4.____
5. The rise and fall of the pitch of your voice adds personality to your voice	True False	5.____
6. There is little specialization in the work of clerical workers in modern offices	True False	6.____
7. Many reports are prepared in modern businesses	True False	7.____
8. Office workers must often cooperate in order to complete many tasks in the office	True False	8.____
9. Working fast requires a rushed pace of work	True False	9.____
10. Entries in bibliographies are listed in alphabetical order	True False	10.____

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Answers For Scoring

11. Quantities in legal documents are usually written in both words and figures .... True False 11. ____
12. Printing is normally easier to read than writing .... True False 12. ____
13. Official titles are always typed on the same line with the person's name........ True False 13. ____
14. The recipient of a letter forms an impression of it by noting its overall attractiveness .... True False 14. ____
15. The typist uses the same quality paper for the second page of a letter as for the first page .... True False 15. ____
16. A wise business person avoids the use of form letters .... True False 16. ____
17. The summary of a report is written after the entire report is completed .... True False 17. ____
18. The topical form of outlining uses words or phrases for headings .... True False 18. ____
19. The Yellow Pages is an example of an alphabetic subject file system .... True False 19. ____
20. A subject line is typed two lines below the salutation .... True False 20. ____
21. Messages can be dictated faster than they can be written out by hand .... True False 21. ____
22. A caller who is unknown to the executive should be introduced to the executive........ True False 22. ____
23. An envelope should be discarded as soon as its contents have been removed .... True False 23. ____
24. The Touch-Tone telephone is considered an improvement over the rotary dial type of telephone .... True False 24. ____
25. The mailgram combines features of a letter and a telegram........ True False 25. ____

Score ____

SECTION C

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column the *letter* corresponding to the item selected.

Answers For Scoring

1. Footnotes are separated from the text by a short horizontal line of: (A) 10 pica or 24 elite spaces, (B) 10 pica or 18 elite spaces, (C) 15 pica or 24 elite spaces, (D) 15 pica or 18 elite spaces........ ____ 1. ____
2. Assets equal liabilities plus: (A) capital, (B) expenses, (C) income, (D) taxes .... ____ 2. ____
3. In a business report the appendix follows the: (A) footnotes, (B) bibliography, (C) conclusions, (D) summary .... ____ 3. ____
4. In open punctuation the typist uses: (A) no marks of punctuation within sentences, but periods and question marks at the ends of sentences, (B) no marks of punctuation between the day and year in the date line, (C) marks of punctuation at the end of the salutation and complimentary close, (D) no marks of punctuation after the salutation and complimentary close .... ____ 4. ____
5. The typist who makes an error should: (A) make the correction on the original only, (B) make the correction on the original first and then on all carbons beginning with the first carbon, (C) make the correction on the original and the first carbon only, (D) make the correction on the last carbon first and move forward to the preceding copy, correcting the original last........ ____ 5. ____
6. You should answer all incoming calls: (A) when you're not busy, (B) after the phone has rung several times, (C) when your employer is in, (D) after the first ring .... ____ 6. ____
7. A PBX system is used to receive incoming calls, to place outgoing calls, and to: (A) make calls between offices within a business, (B) page customers, (C) place callers on hold, (D) screen callers. ____ 7. ____
8. Of the following organizations, the one *most likely* to use a numeric filing system is: (A) a large department store for its customers, (B) the state motor vehicle bureau for car registrations, (C) the central office in a school for its students, (D) a book club for its members........ ____ 8. ____
9. When a caller with an appointment arrives 15 minutes ahead of schedule, the receptionist should say to him: (A) "Mr. Atha, you're too early for your appointment, and I'm not going to tell Mrs. Flint you're here until the time of your scheduled appointment." (B) "Mr. Atha, did you forget your appointment time? You're 15 minutes too early." (C) "Mr. Atha, will you have a seat? Mrs. Flint is talking with someone, but she'll be free in 10 or 15 minutes." (D) "Mr. Atha, could you come back in about 15 minutes when your appointment is scheduled?"........ ____ 9. ____

SECTION C (Continued)

Answers | For Scoring

10. TWPL stands for: (A) Trans World Patrol Lines, (B) Trans World Private Line, (C) Type Writer Private Line, (D) Teletypewriter Private Line .... ______ 10. ______

11. The basic charge for an overnight telegram is for a minimum of: (A) 50 words, (B) 20 words, (C) 100 words, (D) 25 words .... ______ 11. ______

12. A telegraphic message can be filed for transmission by messenger, telephone, or: (A) teleprinter, (B) teletypewriter, (C) mail, (D) telegraph .... ______ 12. ______

13. Coordination of the efforts of many different people requires that: (A) the supervisor check each person's work carefully at the end of each day, (B) each person do his or her job carefully with an understanding of how it fits in with the work of others, (C) each person work carefully alone, giving no attention to others, (D) the supervisor collect all work on a regular basis and put it in order .... ______ 13. ______

14. The cover of a report should contain the title of the report, the name of the person submitting the report, and the: (A) length, (B) date, (C) place of preparation, (D) receiver of the report .... ______ 14. ______

15. There are two kinds of subheadings: sideheadings and: (A) line headings, (B) page headings, (C) paragraph headings, (D) indented headings .... ______ 15. ______

Score ______

SECTION D

INSTRUCTIONS: In each item below are four names. You are to determine which name should be filed *first* and indicate in the Answers column the *letter* corresponding to the name selected.

Answers | For Scoring

1. (A) Kirsch Co., Inc. (B) Carl Kirsch (C) C. A. Kirsch .... ______ 1. ______

2. (A) Mohawk Airlines, Inc. (B) Mohasco Industries, Inc. (C) Mohegan International Corporation (D) Mohican Mills, Inc. .... ______ 2. ______

3. (A) Palm Beach Company (B) Pallet Sales Corporation (C) Palisade Amusement Park (D) Palm Restaurant .... ______ 3. ______

4. (A) Perkins Co., Inc. (B) Leon Perkins (C) L. D. Perkin (D) Perkins-Riley Motors .... ______ 4. ______

5. (A) Hardwick Corporation (B) Hardy's Restaurant (C) Gerald Hardwick (D) Hardin Park .... ______ 5. ______

6. (A) Codex Book Distributors (B) Codex Book Company (C) Codex and Company (D) A. Codex and Company .... ______ 6. ______

7. (A) HBA Fur Company (B) H & B Associates (C) HA Printing Company (D) H & A Jewelry .... ______ 7. ______

8. (A) 378 Restaurant Corporation (B) 3R Corporation (C) Three Sixteen Nook (D) Three Printers .... ______ 8. ______

9. (A) Benjamin Lansing (B) Lansing Construction (C) Lansing's Hardware (D) R. B. Lansing .... ______ 9. ______

10. (A) Jenson Industries (B) Jenson's Limousine Service (C) Jentsons, Inc. (D) Jensen's Dry Cleaners .... ______ 10. ______

11. (A) Virginia MacAuley (B) Richard Macauley (C) Bruce Macauley (D) Jason Bricker.. ______ 11. ______

12. (A) J. Bricker (B) Harry Brikker (C) Susan Brick (D) Jason Bricker .... ______ 12. ______

13. (A) Post Office Department, United States (B) US Gulf Corporation (C) Treasury Department, United States (D) US Iron Works .... ______ 13. ______

14. (A) Portobello Cellar Antiques (B) Puerto Rican Express Company (C) Luciano B. Porto (D) Puerto Rico Lighterage Company .... ______ 14. ______

15. (A) Casa de Portugal (B) Case-Hoyt Corporation (C) Case Duplicating Supplies, Inc. (D) Case, Metz and Dickstein, Inc. .... ______ 15. ______

Score ______

SECTION E

INSTRUCTIONS: Each of the following is either a *good* or a *poor* practice. Indicate your answer by underlining or circling either "Good" or "Poor" in the Answers column.

Answers — For Scoring

1. The typist simplifies typing tasks by always using *Dear Sir* for the salutation .... Good Poor 1. ____
2. The typist double-spaces the inside address of a letter .... Good Poor 2. ____
3. The typest types the name of the recipient of a letter, the page number, and the date on the second page of a letter .... Good Poor 3. ____
4. The typist doesn't take time to indicate enclosures, but just puts them in the envelope with the letter .... Good Poor 4. ____
5. The transcriber listens to the corrections and special instructions on a tape before beginning to transcribe any of the dictated material .... Good Poor 5. ____
6. The transcriber guesses at the information that is missing from dictated material .... Good Poor 6. ____
7. The receptionist answers the phone by saying, "Hi, this is Highland, Inc." .... Good Poor 7. ____
8. The office worker encourages friends to call during office hours on days when the boss is out of town .... Good Poor 8. ____
9. The office worker feels justified in being sarcastic to rude callers .... Good Poor 9. ____
10. The typist makes a carbon copy of a draft of a report in case the original is lost .... Good Poor 10. ____
11. The file clerk has an excellent memory and therefore doesn't have to take time to write up a charge-out slip when someone requests a file folder .... Good Poor 11. ____
12. The typist, when typing cards for a card file, types the name in approximately the center of the card .... Good Poor 12. ____
13. The receptionist verifies the calendar each morning with the executives' secretaries .... Good Poor 13. ____
14. The typist uses letterhead for a draft of a letter to get an idea of how the final product will look . Good Poor 14. ____
15. The office worker reads 4892 as *four eight nine two* .... Good Poor 15. ____
16. The office worker carefully follows the standard procedures for routine office tasks .... Good Poor 16. ____
17. The office worker numbers all pages of a report at one time after the entire report has been typed .... Good Poor 17. ____
18. The office worker carefully proofreads all numbers and graphs with another worker .... Good Poor 18. ____
19. The file clerk prepares a cross-reference sheet for a letter that may be asked for by more than one name .... Good Poor 19. ____
20. The file clerk looks for a release mark on each piece of correspondence received for filing .... Good Poor 20. ____
21. The office worker thinks that exercise is a waste of valuable time .... Good Poor 21. ____
22. The office worker pays attention to details when reading material through the second time .... Good Poor 22. ____
23. The office worker uses a hand position for writing that makes it easy to produce clear, well-formed letters .... Good Poor 23. ____
24. When going out to lunch, the receptionist places a poster on the desk that says "Off duty until one o'clock." .... Good Poor 24. ____
25. The receptionist keeps in a convenient location the telephone numbers of places to be called in case of emergency .... Good Poor 25. ____

Score ____

Clerical Office Procedures
UNIT 9

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

USING MAIL AND SHIPPING SERVICES

Objectives: The student will be able to:

1. know what time during the day would be the congested times at the Post Office and how to possibly eliminate part of that problem.
2. state reasons for using proper ZIP codes on all addresses.
3. state the procedures for opening, dating, and annotating incoming mail.
4. state different classes for handling outgoing mail.
5. chain-feed envelopes.
6. be aware of the pamphlet "How to Package and Wrap Parcels for Mailing".
7. be aware of air and surface shipping for parcels.

Materials Needed:

Registered Mail form

Maximum Time Allowed:

14 days
1 day for test

Procedures:

1. Read pages 370-376 (Part 1).
2. Important Points, page 376.
3. Important Decisions, pages 376-377.
4. Working with Others, page 377.
5. Language Skills, pages 377-378.
6. Arithmetic Skills, page 378.
7. Demonstrating Office Skills, pages 378-379.
8. Read pages 380-392 (Part 2).
9. Important Points, page 392.
10. Important Decisions, page 392.
11. Working with Others, pages 392-393.
12. Language Skills, page 393.
13. Arithmetic Skills, pages 393-394.
14. Demonstrating Office Skills, page 394 (demonstrate #1,2,3 to the teacher).

15. Read pages 395-400 (Part 3).
16. Important Points, page 400.
17. Important Decisions, page 400.
18. Working with Others, page 401.
19. Language Skills, pages 401-402.
20. Arithmetic Skills, page 402 (show work).
21. Demonstrating Office Skills, pages 402-403. (May use sheets of cut paper the size of the envelopes instead of purchasing envelopes.)
22. Read pages 404-409 (Part 4).
23. Important Points, page 409.
24. Important Decisions, page 409.
25. Working with Others, page 410.
26. Language Skills, page 410.
27. Arithmetic Skills, page 411 (show work).
28. Demonstrating Office Skills, page 411 (prepare a written report including 1 and 2 - in 2 tell why you would use a particular mail service).
29. Test 7.

TEST 7

(Based on Unit 9)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

Pasewark • Oliverio

South-Western Publishing Co.

Student____

Class__________________________ Section__________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	20	15	15	50
Student's Score				

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling either "Yes" or "No" in the Answers column.

	Answers	For Scoring
1. Can you exchange spoiled, uncanceled stamped envelopes and cards for stamps, or stamped envelopes and postal cards?	Yes No	1.____
2. Is metered mail canceled and postmarked at the post office?	Yes No	2.____
3. Should you keep a written record of materials being sent to your office under separate cover?	Yes No	3.____
4. Can material be sent as third-class mail if it weighs more than 16 ounces?	Yes No	4.____
5. Must all parcel post packages be sent sealed?	Yes No	5.____
6. Should you mail early and often to hasten the processing and delivery of your mail?	Yes No	6.____
7. Is insurance coverage provided for certified mail?	Yes No	7.____
8. If you presort and separate mail by ZIP Code, will your mail be delivered faster?	Yes No	8.____
9. Are the rates for parcel post determined by the weight and the distance to the destination?	Yes No	9.____
10. After a letter is opened, should the envelope be destroyed immediately?	Yes No	10.____
11. Are only two folds necessary if a letter is placed in a No. 6 envelope?	Yes No	11.____
12. Can postage stamps be purchased in sheet, booklet, and coil form?	Yes No	12.____
13. Does the use of precanceled stamps and precanceled stamped envelopes speed the processing of mail?	Yes No	13.____
14. Should you make a notation on the original letter if you made a photocopy to be sent to another department?	Yes No	14.____
15. Should personal and confidential mail be delivered to the addressee unopened?	Yes No	15.____
16. Should special delivery letters and registered mail be delivered to the addressee unopened?	Yes No	16.____
17. Is $100 the maximum amount collectible on a single COD package?	Yes No	17.____
18. Is there an approved list of two-letter state abbreviations which should be used along with ZIP Codes on envelope addresses?	Yes No	18.____
19. Is the first-class mail rate to Canada and Mexico the same as the United States domestic rate?	Yes No	19.____
20. Are carbon copies and photocopies of letters sent as second-class mail?	Yes No	20.____

Score ________

SECTION B

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column the *letter* corresponding to the item selected.

	Answers	For Scoring
1. Rates and routings for freight, express, and parcel post can be found in: (A) Leonard's Guide, (B) Lawrence's Rate Manual, (C) Mail Rates and Routes	______	1.____
2. Money, checks, jewelry, stock certificates, and bonds are included in the valuable items frequently sent by: (A) certified mail, (B) special delivery, (C) registered mail	______	2.____
3. It is almost impossible to trace unregistered, uninsured, or uncertified mail if it does not carry a: (A) ZIP Code, (B) return address, (C) first-class permit number	______	3.____
4. When you route the mail, you: (A) photocopy letters for other departments, (B) sort it according to addressee or department, (C) send it to the post office	______	4.____
5. To speed the processing of outgoing mail, the number of the apartment, room, suite, or other residential unit should appear on the envelope: (A) on the line below the street address, (B) on the line above the street address, (C) immediately after the street address on the same line	______	5.____

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SECTION B (Continued)

	Answers	For Scoring
6. Attached to every overseas parcel post package there must be a: (A) routing slip, (B) customs declaration form, (C) return receipt	______	6. ______
7. A parcel labeled *Special Handling* will be given the same prompt handling and delivery as is given to: (A) special delivery, (B) express mail, (C) first-class mail	______	7. ______
8. Claims for loss are presented by either the shipper or the addressee depending upon: (A) who has the time, (B) where the goods were damaged, (C) who owns the goods	______	8. ______
9. The first digit of the ZIP Code is used to route the mail to: (A) the delivery area or the post office of destination, (B) one of the ten large geographic areas of the country, (C) a large post office or designated sectional center	______	9. ______
10. The swiftest method of commercial transportation is: (A) air parcel post, (B) air express, (C) United Parcel Service	______	10. ______
11. A package containing three dozen pears would be marked: (A) *Handle with care*, (B) *Fragile*, (C) *Perishable*	______	11. ______
12. If an Optical Character Reader is used, the address on an envelope should be typed: (A) double spaced in block form, (B) single spaced in block form, (C) single spaced in indented form	______	12. ______
13. Additions, deletions, and corrections of names and addresses on a mailing list should be made: (A) at the end of the fiscal year, (B) at the first of the year, (C) whenever the information is received	______	13. ______
14. The meter of the postage machine is set for the amount paid: (A) in the mail room, (B) in the purchasing department, (C) at the post office	______	14. ______
15. Anything can be sent by express mail up to: (A) 40 pounds, (B) 50 pounds, (C) 45 pounds	______	15. ______

Score ______

SECTION C

INSTRUCTIONS: Identify each of the mailing definitions given in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers Column. No term in Column I is used more than once and some are not used at all. Item No. 0 is given as an example.

COLUMN I

A. Annotating mail
B. Certified mail
C. COD service
D. Computer addressing
E. Express mail
F. First-class mail
G. Insured mail
H. Mailing list
I. Optical Character Reader
J. Parcel post
K. Postage meter machine
L. *Postage Service Manual*
M. Recalling mail
N. Registered mail
O. Second-class mail
P. Special delivery
Q. Special handling
R. Third-class mail
S. Tracing mail
T. ZIP Code

COLUMN II	Answers	For Scoring
0. Mailing manual published by the federal government	L	0. ✓
1. Service by which first-class mail is delivered immediately upon receipt at the post office at the point of destination	______	1. ______
2. Books, catalogs, circulars, advertisements, and miscellaneous printed matter weighing not more than 16 ounces	______	2. ______
3. Provides a receipt for the sender and a record of delivery of mail with no value of its own	______	3. ______
4. Writing answers and comments in the margin of incoming mail	______	4. ______
5. Five-digit number that identifies the destination of a piece of mail	______	5. ______
6. When a buyer pays for merchandise upon delivery	______	6. ______
7. Automatically prints the amount of postage, postmark, and date	______	7. ______
8. Equipment that can read printed or typewritten addresses	______	8. ______
9. Also known as fourth-class mail	______	9. ______
10. Domestic first-class mail insured up to $10,000	______	10. ______
11. Fourth-class mail sent as expeditiously as first-class mail	______	11. ______
12. Mail sealed or otherwise closed against inspection	______	12. ______
13. Third- and fourth-class mail insured up to $200	______	13. ______
14. Newspapers and magazines sent through the mail	______	14. ______
15. Written request to locate mail not delivered within the expected period of time	______	15. ______

Score ______

Clerical Office Procedures
UNIT 10

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

THE OFFICE WORKER AND DATA PROCESSING

Objectives: The student will be able to:

1. define data processing.
2. better understand how records connected with their daily lives are processed by computers.
3. understand the importance of accurate typing in data processing.

Materials Needed:

None

Maximum Time Allowed:

14 days
1 day for test

Procedures:

1. Read pages 414-421 (Part 1).
2. Important Points, page 421.
3. Important Decisions, page 421.
4. Working with Others, page 421.
5. Language Skills, page 422.
6. Arithmetic Skills, page 422.
7. Demonstrating Office Skills, page 423 (ask the teacher if a field trip can be arranged for #1).
8. Read pages 424-429 (Part 2).
9. Important Points, page 429.
10. Important Decisions, page 430.
11. Working with Others, page 430.
12. Language Skills, page 430.
13. Arithmetic Skills, page 431.
14. Demonstrating Office Skills, page 432.
15. Read pages 433-441 (Part 3).
16. Important Points, page 441.
17. Important Decisions, page 442.

18. Working with Others, page 442.
19. Language Skills, page 442.
20. Arithmetic Skills, page 443.
21. Demonstrating Office Skills, pages 443-444.
22. Read pages 445-450 (Part 4).
23. Important Points, page 450.
24. Important Decisions, page 450.
25. Working with Others, page 450.
26. Language Skills, page 451.
27. Arithmetic Skills, pages 451-452.
28. Demonstrating Office Skills, pages 452-453.
29. Test 8.

TEST 8

(Based on Unit 10)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

Pasewark • Oliverio

South-Western Publishing Co.

Student ______________________

Class ______________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	20	15	15	50
Student's Score				

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling either "Yes" or "No" in the Answers column at the right.

Answers — For Scoring

1. Are punched cards and punched paper tape two forms of software? .... Yes No 1.____
2. Do accounting machines have a central processing unit? .... Yes No 2.____
3. Are three outstanding advantages of electronic data processing systems speed, accuracy, and storage? .... Yes No 3.____
4. Are ten-key listing machines used primarily for multiplication and division? .... Yes No 4.____
5. Can the computer retain information put into it for future reference? .... Yes No 5.____
6. Since computers work so quickly and accurately, is the need for human beings in business today reduced? .... Yes No 6.____
7. Whether they realize it or not, are human beings constantly processing data mentally? .... Yes No 7.____
8. Does the electronic method of processing data combine the talents of people with the speed and accuracy of computers? .... Yes No 8.____
9. Is data processing a new business activity? .... Yes No 9.____
10. Do flowcharts enable people to visualize processes easily? .... Yes No 10.____
11. Do optical scanners print characters on documents with special magnetic ink? .... Yes No 11.____
12. Are electronic calculators the most modern of all calculators? .... Yes No 12.____
13. Does the term *data processing* mean the arranging of words, numbers, and symbols to provide useful information? .... Yes No 13.____
14. Should a ten-key listing machine be operated by touch? .... Yes No 14.____
15. Can an output document be a punched card? .... Yes No 15.____
16. Should card verifying be done by the operator who punched the cards originally? .... Yes No 16.____
17. Could the storage section be considered the nerve center of the data processing system? .... Yes No 17.____
18. Do cash registers process data? .... Yes No 18.____
19. Does the input step precede the origin step in the data processing cycle? .... Yes No 19.____
20. Does processing data involve classifying, calculating, and summarizing data? .... Yes No 20.____

Score ________

SECTION B

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column the *letter* corresponding to the item selected.

Answers — For Scoring

1. The speed and accuracy of processing data manually are: (A) comparatively low, (B) comparatively high, (C) comparatively fast .... ______ 1.____
2. The term that is *not* another name for the unit record system is: (A) tabulating system, (B) collating system, (C) punched card system .... ______ 2.____
3. The holes in a punched card represent: (A) data (numbers, symbols, and words), (B) storage, (C) documents .... ______ 3.____
4. The main advantage of the ten-key listing machine is: (A) it can be operated by the touch method, (B) it is portable, (C) each key is depressed separately .... ______ 4.____

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SECTION B (Continued)

Answers | For Scoring

5. The card punch, verifier, sorter, tabulator, and collator are all parts of the: (A) manual system of data processing, (B) mechanical system of data processing, (C) punched card system of data processing .... ______ 5.______

6. The printing calculator is preferred by many accountants because: (A) it is better suited for adding and subtracting, (B) it is completely noiseless, (C) the tape from it can be forwarded with the source material from which the computations were made .... ______ 6.______

7. Bookkeeping machines are also known as: (A) invoicing machines, (B) sorting machines, (C) billing machines .... ______ 7.______

8. The earliest means of processing data was the: (A) computer, (B) human mind, (C) calculator .... ______ 8.______

9. If you processed some of the data by hand and some by punched card machines, you would be using the: (A) manual method of processing data, (B) mechanical method of processing data, (C) unit record method of processing data .... ______ 9.______

10. ▭ is the flowchart symbol for: (A) input, (B) document, (C) process .... ______ 10.______

11. The tabulator is used to: (A) sort punched cards, (B) print automatically the information punched in cards, (C) merge two or more card decks .... ______ 11.______

12. The purpose of a card punch machine is to: (A) duplicate information, (B) verify information, (C) transfer data onto a card in the form of punched holes .... ______ 12.______

13. In the data processing cycle, recording the information in a form that can be easily used by the computer is considered the: (A) output step, (B) processing step, (C) input step .... ______ 13.______

14. The purpose of a verifier is to: (A) punch the cards, (B) check the original card punching, (C) sort the cards .... ______ 14.______

15. The process section of a computer: (A) manipulates (adds, subtracts, multiplies, and divides) the data, (B) stores the data, (C) sorts the data .... ______ 15.______

Score ______

SECTION C

INSTRUCTIONS: Identify each definition given in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column. No term in Column I is used more than once and some are not used at all. Item 0 is given as an example.

COLUMN I

A. Audit tape
B. Central processing unit
C. Control section
D. External information
E. Flowchart
F. Full-bank listing machine
G. Information
H. Integrated data processing
I. Internal information
J. MICR
K. Nanosecond
L. Origin
M. Processing
N. Program
O. Punched card system
P. Random access
Q. Rotary calculator
R. Source document
S. Storage section

COLUMN II	Answers	For Scoring
0. Machine used for multiplication and division	Q	0. ✓
1. A business paper used to record data for the first time		1.
2. Paper tape on which transactions are recorded		2.
3. Another name for the full-keyboard listing machine		3.
4. Information used within a company		4.
5. Part of computer which stores information		5.
6. One billionth of a second		6.
7. The beginning or start of something		7.
8. The unit record method of processing data		8.
9. Part of the computer that receives and analyzes each instruction		9.
10. A list of instructions to the computer		10.
11. Process that unites the work of data processing machines		11.
12. Machine that reads magnetic ink characters		12.
13. Diagram of how something moves in business		13.
14. Technique of locating information on a magnetic disk		14.
15. Arranging data in an organized manner		15.

Score ______

Clerical Office Procedures
UNIT 11

Name ______________
Period ______________
Date Started ______________
Date Completed ______________
Grade ______________

THE OFFICE WORKER AND REPROGRAPHICS

Objectives: The student will be able to:

1. define the term "reprographics".
2. demonstrate the operation of the duplicating machine.
3. demonstrate the operation of the offset press.
4. conserve on cost of duplicating supplies.
5. state at least 3 safety hazards in operating reprographics equipment.

Materials Needed:

1. Ditto - master
2. Single-edged razor blade
3. Stencil
4. Correction fluid for stencil, paper clip, cushion sheet
5. Offset master, offset ribbon, offset pen, offset pencil, offset eraser.

Maximum Time Allowed:

12 days
1 day for test

Procedures:

1. Read pages 454-460 (Part 1).
2. Important Points, page 460.
3. Important Decisions, page 460.
4. Working with Others, pages 460-461.
5. Language Skills, page 461.
6. Arithmetic Skills, page 461.
7. Demonstrating Office Skills, pages 462-463.
8. Read pages 464-471 (Part 2).
9. Important Points, page 471.
10. Important Decisions, page 471.
11. Working with Others, page 471.
12. Language Skills, page 471.
13. Arithmetic Skills, page 472 (show work).
14. Demonstrating Office Skills, page 472.

15. Read pages 473-479 (Part 3).
16. Important Points, pages 479-480.
17. Important Decisions, page 480.
18. Working with Others, page 480.
19. Language Skills, pages 480-481.
20. Arithmetic Skills, page 481.
21. Demonstrating Office Skills, page 481.
22. Read pages 482-493 (Part 4).
23. Important Points, page 493.
24. Important Decisions, page 493.
25. Working with Others, page 494.
26. Language Skills, page 494.
27. Arithmetic Skills, page 495 (show work).
28. Demonstrating Office Skills, pages 495-496.
29. Test 9

TEST 9

(Based on Unit 11)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

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Student ______________________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	30	10	10	50
Student's Score				

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Does pressure on the face of the fluid master created by a typewriter key or writing instrument deposit a carbon image on the back of the master sheet?	Yes No	1. ______
2. Can an infrared copier reproduce copies if the material to be copied does not contain carbon?	Yes No	2. ______
3. Does a stencil made on an electronic stencil maker have to be proofread?	Yes No	3. ______
4. Should you leave the paper bail rollers inside the boundary markings of the offset master?	Yes No	4. ______
5. Does an electric typewriter automatically give you an even touch for cutting a stencil?	Yes No	5. ______
6. Can fluid masters be stored and used again?	Yes No	6. ______
7. If your employer wanted 5,000 copies of a program for an important meeting, would you duplicate the program on a fluid duplicator?	Yes No	7. ______
8. Should you proofread and make corrections on a master before removing it from the typewriter?	Yes No	8. ______
9. Does a soft, nongreasy eraser have to be used when correcting an offset master?	Yes No	9. ______
10. Do some models of copiers produce fluid masters and offset mats?	Yes No	10. ______
11. Can a copier be used to answer a letter by making handwritten notations on the original letter and then copying it before mailing the original back to the sender?	Yes No	11. ______
12. Can handwriting and artwork be reproduced when using a fluid duplicator?	Yes No	12. ______
13. Is the large drum of rubber on an offset duplicator called a blanket?	Yes No	13. ______
14. When typing a stencil, will the use of a sheet of cellophane film help to produce bolder copy?	Yes No	14. ______
15. Is a cushion sheet useful when typing a fluid master?	Yes No	15. ______
16. Can more than one color be reproduced when using the fluid duplicating process?	Yes No	16. ______
17. Would a photocopier be the fastest way to make ten copies of a business paper?	Yes No	17. ______
18. Do all office employees normally operate offset duplicating machines?	Yes No	18. ______
19. When typing a stencil, should you strike with more force keys which have small sharp printing surfaces such as the *c* and the period?	Yes No	19. ______
20. When correcting an error on a fluid master, do you first scrape off the unwanted carbon?	Yes No	20. ______
21. Should you wait until you have finished the entire stencil before making any corrections?	Yes No	21. ______
22. Can some models of photocopiers enlarge or reduce the material during the copying process?	Yes No	22. ______
23. Are photocopiers hard to operate?	Yes No	23. ______
24. Are copies made by the stencil process of better quality than copies made by the offset process?	Yes No	24. ______
25. Can fluid carbon paper be used only once?	yes No	25. ______
26. Should you type a guide copy before you type a stencil?	Yes No	26. ______
27. Can offset duplicators reproduce black only?	Yes No	27. ______
28. Should you leave at least one-half inch of blank space at the top and bottom of a fluid master?	Yes No	28. ______
29. Does the offset process operate on the principle that "grease and water will not mix"?	Yes No	29. ______
30. Is one advantage of photocopying not having to prepare a master or stencil from the original?	Yes No	30. ______

Score ______

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SECTION B

INSTRUCTIONS: Identify each item below in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column.

COLUMN I	COLUMN II	Answers	For Scoring
A. Photocopier	1. The duplication process used when up to 10,000 copies are needed and quality need not be the finest	______	1.____
B. Reprographics	2. The duplication process used mostly for interoffice communications and which is the least expensive duplicating process for about 10 to 30 copies	______	2.____
C. Offset duplication	3. The duplication process used when large quantities of excellent quality copies are needed	______	3.____
D. Fluid duplication	4. The process of pushing aside the wax coating on the fibrous stencil sheet with a typewriter key	______	4.____
E. Electronic stencil or master maker	5. The sample that shows how the final duplicated copy will look	______	5.____
F. Stencilization	6. A chemical substance used in the correction of errors on stencils	______	6.____
G. Stencil duplication	7. A machine used to make offset masters, fluid masters, and stencils from a drawing or typed page	______	7.____
H. Collating	8. The machine used when an exact duplicate of a document is needed.	______	8.____
I. Guide copy	9. Assembling the pages of a duplicating job in the proper order and fastening the pages into sets	______	9.____
J. Correction fluid	10. The term that encompasses all duplicating and photocopying processes	______	10.____

Score ______

SECTION C

INSTRUCTIONS: In the blank space at the end of each line, write the item defined, explained, or described by the statement.

	Answers	For Scoring
1. When you are preparing a stencil, you should move the ribbon control to what position?	______	1.____
2. To aid you in positioning properly the material on a stencil, provided on the stencil are	______	2.____
3. When the material to be typed on a stencil is first placed on ordinary typing paper, this copy is called the	______	3.____
4. The duplicating process which makes copies on which the printing looks like the type on a page in a book is	______	4.____
5. When correcting an error on a stencil, to replace the stencil coating you use a small amount of	______	5.____
6. When you need 200 copies of an item, but the quality of the copies is not important, you would probably use a/an	______	6.____
7. The machine that can reproduce a complicated drawing exactly is a/an	______	7.____
8. A machine that creates electronically a master or a stencil from an original copy is called a/an	______	8.____
9. Two common types of photocopier are infrared and	______	9.____
10. The process of gathering or assembling a duplicated job of two or more pages is called	______	10.____

Score ______

Clerical Office Procedures
UNIT 12

Name ______________
Period ______________
Date Started ______________
Date Completed ______________
Grade ______________

WORKING WITH PURCHASING AND RECEIVING

Objectives: The student will be able to:

1. understand the purchasing and receiving functions in an organization.
2. describe how clerical workers assist purchasing executives.
3. define vendor evaluation.
4. define the term "materials acquisition".

Materials Needed:

None

Maximum Time Allowed:

6 days

Procedures:

1. Read pages 498-503 (Part 1).
2. Important Points, page 503.
3. Important Decisions, page 504.
4. Working with Others, page 504.
5. Language Skills, pages 504-505.
6. Arithmetic Skills, page 505 (show work).
7. Demonstrating Office Skills, pages 505-506.
8. Read pages 507-514 (Part 2).
9. Important Points, pages 514-515.
10. Important Decisions, page 515.
11. Working with Others, page 515.
12. Language Skills, page 515.
13. Arithmetic Skills, page 516 (show work).
14. Demonstrating Office Skills, pages 516-517.

Clerical Office Procedures
UNIT 13

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

WORKING WITH INVENTORIES

Objectives: The student will be able to:

1. define the term "inventory control".
2. discuss the role of the clerical worker and the problems of management in inventory control.
3. discuss reasons for inventory management.

Materials Needed:

Typing paper

Maximum Time Allowed:

7 days

Procedures:

1. Read pages 520-528 (Part 1).
2. Important Points, pages 528-529.
3. Important Decisions, page 529.
4. Working with Others, page 529.
5. Language Skills, pages 529-530.
6. Arithmetic Skills, page 530 (show work).
7. Demonstrating Office Skills, pages 530-532.
8. Read pages 533-539 (Part 2).
9. Important Points, page539.
10. Important Decisions, pages 539-540.
11. Working with Others, page 540.
12. Language Skills, page 540.
13. Arithmetic Skills, page 541 (show work).
14. Demonstrating Office Skills, page 541.

Clerical Office Procedures
UNIT 14

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

WORKING WITH SALES

Objectives: The student will be able to:

1. discuss problems arising out of incorrectly prepared sales invoices.
2. define the term "selling".
3. discuss why satisfied customers are important to a business.

Materials Needed:

None

Maximum Time Allowed:

5 days
1 day for test

Procedures:

1. Read pages 544-548 (Part 1).
2. Important Points, page 548.
3. Important Decisions, pages 548-549.
4. Working with Others, page 549.
5. Language Skills, pages 549-550.
6. Arithmetic Skills, page 550 (show work).
7. Demonstrating Office Skills, pages 550-551.
8. Read pages 552-564 (Part 2).
9. Important Points, page 565.
10. Important Decisions, page 565.
11. Working with Others, page 565.
12. Language Skills, page 566.
13. Arithmetic Skills, pages 566-567 (show work).
14. Demonstrating Office Skills, pages 567-568.
15. Test 10

TEST 10

(Based on Units 12, 13, and 14)

CLERICAL OFFICE PROCEDURES
(Sixth Edition)

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Student ____________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	25	10	15	50
Student's Score				

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False" in the Answers column.

	Answers	For Scoring
1. The purchasing function must be centralized to be efficient	True False	1. ____
2. Office workers prepare forms that aid purchasing agents	True False	2. ____
3. A firm seeks vendors who will provide the needed goods on schedule	True False	3. ____
4. Cost is not a consideration when a decision is made about a purchase	True False	4. ____
5. Purchasing departments maintain the latest prices for the products they buy	True False	5. ____
6. The Yellow Pages is the best reference for sources for new products needed in the manufacture of consumer goods	True False	6. ____
7. Purchasing departments sometimes place orders through sales representatives	True False	7. ____
8. Generally one copy of a purchasing order is sufficient	True False	8. ____
9. The vendor's sales invoice is the buyer's purchase invoice	True False	9. ____
10. A purchasing department clerk should check a purchase order against the purchase invoice	True False	10. ____
11. A copy of the receiving record is sent to the accounting department	True False	11. ____
12. The most important aspect of inventory control is storing all goods in an orderly fashion	True False	12. ____
13. A retail store that sells many small items is likely to use a perpetual inventory system	True False	13. ____
14. The minimum level of an item is that quantity that is estimated to be sufficient until the new order is received	True False	14. ____
15. A large firm is likely to have a number of stockrooms	True False	15. ____
16. A distributive firm buys many raw materials	True False	16. ____
17. A goods in process inventory is the same as a components inventory	True False	17. ____
18. Sometimes employees of stockrooms are bonded	True False	18. ____
19. To get an accurate financial picture of a firm, it is necessary to make a careful annual count of all items held in inventory	True False	19. ____
20. Selling personnel in a firm generally handle the office work that supports selling efforts	True False	20. ____
21. Reports that sales representatives make when they visit customers are filed as soon as the representatives reach the home office	True False	21. ____
22. Customers can seldom buy goods via telephone	True False	22. ____
23. Regular customers of a firm generally pay cash for goods when they are delivered	True False	23. ____
24. A firm wants its customers to be satisfied	True False	24. ____
25. An adjustment letter is usually a form letter	True False	25. ____

Score ________

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SECTION B

INSTRUCTIONS: Identify each item described in Column II by selecting one of the terms in Column I and writing its *letter* in the Answers column.

COLUMN I

A. Adjustment letter
B. Cash discount
C. Credit memorandum
D. Form letter
E. Purchase order
F. Purchase requisition
G. Quantity discount
H. Receiving record
I. Request for quotation
J. Sales order form
K. Sales invoice
L. Sales letter
M. Stockroom requisition
N. Trade discount

COLUMN II	Answers	For Scoring
1. Used by most business firms to inform customers of special goods and services they have to offer	______	1.____
2. Form on which you give your name and department, the date, and a list of the supplies you need	______	2.____
3. Form used to request an order for items from an outside firm	______	3.____
4. Form used to request information about the price of a product	______	4.____
5. Form especially designed for ordering goods	______	5.____
6. Form issued by a supplier when goods are returned for some reason.	______	6.____
7. Form mailed to your purchasing department by the vendor usually on the day the goods are shipped	______	7.____
8. Letter used to answer similar questions from many customers	______	8.____
9. Reduction in the price of an order given to a buyer who pays within a specified time	______	9.____
10. Reduction in price because the purchase is large	______	10.____

Score ______

SECTION C

INSTRUCTIONS: Each statement below describes either a *good* practice or a *poor* practice. Indicate your answer by underlining or circling "Good" or "Poor" in the Answers column.

	Answers	For Scoring
1. The company waits until it has used all supplies on hand before new supplies are ordered	Good Poor	1.____
2. The purchasing department places an order without knowing current prices	Good Poor	2.____
3. A company fails to pay the invoice within the period which allows for a discount	Good Poor	3.____
4. The purchasing department maintains a follow-up file of purchase orders	Good Poor	4.____
5. A record is made of each incoming shipment as soon as it is stored in the stockroom	Good Poor	5.____
6. There is an established location for each item kept in the stockroom	Good Poor	6.____
7. When the stockroom clerk knows the employee who is requesting supplies, the clerk doesn't require that a form be filled in	Good Poor	7.____
8. The sales clerk checks each detail of a telephone order to be sure all information is complete and accurate	Good Poor	8.____
9. All goods are bought in large quantities in order to take advantage of all quantity discounts	Good Poor	9.____
10. The manager of the stockroom gets rid of obsolete items still in stock	Good Poor	10.____
11. The purchasing agent tries to obtain needed materials of the desired quality at the most reasonable prices	Good Poor	11.____
12. A purchasing department uses a procedure in which each step follows the one before it	Good Poor	12.____
13. A firm has a complete record of all incoming shipments prepared within a month after they are received	Good Poor	13.____
14. A follow-up file is kept in which copies of all purchase orders are filed according to the date of their expected delivery	Good Poor	14.____
15. When the credit department refuses to approve an extension of credit, the order is immediately shipped COD	Good Poor	15.____

Score ______

Clerical Office Procedures
UNIT 15

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

THE OFFICE WORKER AND FINANCIAL DUTIES

Objectives: The student will be able to:

1. understand the importance of neatness in writing and accuracy in keeping records.
2. discuss duties of clerical workers in banking organizations.
3. write a check properly.

Materials Needed:

Supplies book

Maximum Time Allowed:

11 days
1 day for test

Procedures:

1. Read pages 570-580 (Part 1).
2. Important Points, page 580.
3. Important Decisions, page 580.
4. Working with Others, page 580.
5. Language Skills, page 581.
6. Arithmetic Skills, page 581.
7. Demonstrating Office Skills, pages 581-582.
8. Read pages 583-590 (Part 2).
9. Important Points, page 590.
10. Important Decisions, pages 590-591.
11. Working with Others, page 591.
12. Language Skills, page 591.
13. Arithmetic Skills, page 592.
14. Demonstrating Office Skills, page 592.
15. Read pages 593-604 (Part 3).
16. Important Points, page 604.
17. Important Decisions, page 604.
18. Working with Others, pages 604-605.
19. Language Skills, page 605.
20. Arithmetic Skills, page 605.
21. Demonstrating Office Skills, pages 606-607.
22. Test 11.

TEST 11

(Based on Unit 15)

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Student ________________________________

Class ____________________ Sections ________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	10	10	20	10	50
Student's Score					

SECTION A

INSTRUCTIONS: In each of the following sentences, insert in the Answers column the item that best completes the statement.

Answers — For Scoring

1. Postal money orders can be purchased at a/an.. ____________ 1.____
2. The indorsement that should *not* be used if a check is going to be sent through the mail.. ____________ 2.____
3. An order drawn by one bank on its deposits in another bank to pay a third party is called a/an.. ____________ 3.____
4. A system of maintaining records that reduces the possibility of fraud is referred to as a system of.. ____________ 4.____
5. The record that lists all employees at work for a given payroll period is called a/an.. ____________ 5.____
6. A form supplied by the bank on which you list currency, checks, or money orders to be deposited in the bank is called a/an.. ____________ 6.____
7. When a depositor writes a check on an account which does not contain sufficient funds to cover the full payment, the account is said to be.. ____________ 7.____
8. The person who is to receive the money when a check is cashed is called the.. ____________ 8.____
9. Immediately before writing a check, you should fill in the.. ____________ 9.____
10. The notation written across the back of a check at the top of the left end is called the.. ____________ 10.____

SECTION B

INSTRUCTIONS: Identify each item given in Column II by selecting one of the terms in Column I and writing its *letter* in the Answers column.

COLUMN I

A. Piece-rate method
B. Canceled check
C. Bank statement
D. Restrictive indorsement
E. Commission method
F. Gross pay
G. Payroll change sheet
H. Payroll cash slip
I. Special indorsement
J. Blank indorsement
K. Reconciling the bank statement
L. Employee's earnings record
M. Net pay
N. Salary method

COLUMN II — Answers — For Scoring

1. Can serve as a receipt.. ______ 1.____
2. Wages or salary earned, before deductions.. ______ 2.____
3. Paying employees for what they produce during a stated period....... ______ 3.____
4. Paying employees a stated amount for each pay period.................. ______ 4.____
5. An indorsement which shows the indorser's signature and the purpose for which the check is being transferred.............................. ______ 5.____
6. An indorsement which consists of only the indorser's signature....... ______ 6.____
7. An indorsement which shows the name of the person to whom the check is being transferred and the indorser's signature.................. ______ 7.____
8. Record which shows the amount of money one employee has earned ______ 8.____
9. A document mailed monthly by the bank to a depositor which lists the additions and deductions made to the account over the past month.. ______ 9.____
10. The process of accounting for any difference there may be between the final balance on the bank statement and the checkbook balance... ______ 10.____

Score ______

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SECTION C

INSTRUCTIONS: The answer to each of the following items is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column.

	Answers	For Scoring
1. Are checks ordinarily written in pencil?	______	1. ____
2. Are checks *negotiable*?	______	2. ____
3. Are American Express money orders good indefinitely?	______	3. ____
4. Is a petty cash fund maintained in the accounting department for use by all other departments in the organization?	______	4. ____
5. Is a petty cash fund ordinarily replenished when its balance is zero?	______	5. ____
6. Is it necessary to keep a record of the purpose of the expenditures paid for with petty cash funds?	______	6. ____
7. Should the person who prepares the payroll sign the checks for employees?	______	7. ____
8. Do workers who earn the same salary have the same deductions from their gross earnings for federal income tax?	______	8. ____
9. Does the employer make a contribution for each employee to FICA tax?	______	9. ____
10. Does the employer make a contribution for each employee to federal income tax?	______	10. ____
11. Has the rate for social security tax been the same since 1960?	______	11. ____
12. Does the employee's earnings record show the accumulated taxable earnings?	______	12. ____
13. Are computers ever used for payroll processing?	______	13. ____
14. Is a check-signing machine ever used in a business office?	______	14. ____
15. Do banks ever charge for handling overdrafts?	______	15. ____
16. Do some firms pay employees in cash rather than by check?	______	16. ____
17. Is an indorsement preceded by the words *For Deposit Only* an indorsement in full?	______	17. ____
18. Is gross income the amount actually taken home by the employee?	______	18. ____
19. In business, is cash used to pay large expenses?	______	19. ____
20. Should checks marked *Void* be saved?	______	20. ____

Score ______

SECTION D

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False" in the Answers column.

	Answers	For Scoring
1. A check cannot be used as a receipt for payment	True False	1. ____
2. Banks are permitted to charge for the services they provide	True False	2. ____
3. Outstanding check balances must be added to the balance on the checkbook stub	True False	3. ____
4. Monthly statements received do not need to be checked since they represent payments for services provided	True False	4. ____
5. An ordinary check provides more information about the purpose of the check than does a voucher check	True False	5. ____
6. Form W-4 indicates the number of exemptions you claim	True False	6. ____
7. Accounting machines save time and reduce errors	True False	7. ____
8. Social security tax is paid only on the amount of earnings specified by law	True False	8. ____
9. Deductions are often shown on payroll checks	True False	9. ____
10. Overtime pay is generally computed at twice the regular rate of pay	True False	10. ____

Score ______

Clerical Office Procedures
UNIT 16

Name ____________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

YOU AS AN OFFICE WORKER

Objectives: The student will be able to:

1. discuss procedures for applying for a job.
2. prepare a resumé.
3. write a letter of application.
4. discuss interview techniques.

Materials Needed:

1. Newspaper
2. Typing paper

Maximum Time Allowed:

12 days
1 day for test
2 days for review
1 day for final examination

Procedures:

1. Read pages 610-616 (Part 1).
2. Important Points, page 616.
3. Important Decisions, page 617.
4. Working with Others, page 617.
5. Language Skills, page 618.
6. Arithmetic Skills, page 618.
7. Demonstrating Office Skills, page 619.
8. Read pages 620-631 (Part 2).
9. Important Points, page 631.
10. Important Decisions, page 631.
11. Working with Others, page 632.
12. Language Skills, page 632.
13. Arithmetic Skills, pages 632-633.
14. Demonstrating Office Skills, page 633.

15. Read pages 634-639 (Part 3).
16. Important Points, page 639.
17. Important Decisions, pages 639-640.
18. Working with Others, page 640.
19. Language Skills, page 640.
20. Arithmetic Skills, pages 640-641.
21. Demonstrating Office Skills, page 641.
22. Read pages 642-650 (Part 4).
23. Important Points, page 650.
24. Important Decisions, page 650.
25. Working with Others, page 651.
26. Language Skills, page 651.
27. Arithmetic Skills, pages 651-652.
28. Demonstrating Office Skills, page 652.
29. Test 12
30. FINAL EXAMINATION

TEST 12

(Based on Unit 16)

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Student ______________________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	15	25	10	50
Student's Score				

SECTION A

INSTRUCTIONS: Each of the following practices is either a *good* or a *poor* practice. Indicate your answer by underlining or circling either "Good" or "Poor" in the Answers column.

	Answers	For Scoring
1. Jane is interested in working in a particular company so she wrote a letter of inquiry to that company	Good Poor	1.____
2. Fred asked the receptionist if he could talk with the accounting manager when he went to a company to apply for a job	Good Poor	2.____
3. When she applied for a job, Sally carried a card with her on which she had listed information about her work experience, studies, and extracurricular activities	Good Poor	3.____
4. Nora didn't list any references on her personal data sheet	Good Poor	4.____
5. Maryanne made notes as the instructions for a clerical test were given orally	Good Poor	5.____
6. George completed the clerical aptitude test early so he walked out of the room	Good Poor	6.____
7. Hector had some questions about the company in which he was being interviewed, but he didn't think it would be polite to raise them	Good Poor	7.____
8. Lisa thought it was a waste of time to learn about the entire company during the orientation period	Good Poor	8.____
9. Bert asked his clerical office procedures teacher if he could list her name as a reference on an application form	Good Poor	9.____
10. Nancy told the interviewer that she would not consider a job unless she would be working with a top executive	Good Poor	10.____
11. Lynn practiced briefly on the typewriter that she was to use for a performance test	Good Poor	11.____
12. Monica stood at the interviewer's door at the end of her interview and told the interviewer about her unsuccessful part-time jobs	Good Poor	12.____
13. Roger wrote a brief thank you letter the day after his job interview	Good Poor	13.____
14. Since Lucy had taken a job with one company, she didn't answer the letter from another company offering her a position	Good Poor	14.____
15. Since Patricia had her typewriting grades with her, she asked if she could be excused from taking a typewriting test when she applied for a position	Good Poor	15.____

Score ________

SECTION B

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False" in the Answers column.

	Answers	For Scoring
1. There are many types of organizations that have no need for clerical workers	True False	1.____
2. Small organizations tend to have centralized personnel offices	True False	2.____
3. Public employment offices charge a small fee for assistance given to persons seeking jobs	True False	3.____
4. The classified section of the newspaper often contains notices of job vacancies	True False	4.____
5. Personnel offices generally see applicants without appointments	True False	5.____
6. Nowadays most employees are hired without personal interviews	True False	6.____
7. There is very little specific information that you need to provide on an application form	True False	7.____
8. Typing tests are seldom given to clerical applicants	True False	8.____

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SECTION B (Continued)

Answers — For Scoring

9. Interviewers note the alertness with which applicants answer questions .... True False 9.____
10. The applicant's use of English is seldom evaluated by an interviewer .... True False 10.____
11. Applicants can expect to learn if they have the job at the end of the interview................ True False 11.____
12. Part-time work experience should not be listed on a job application .... True False 12.____
13. Personal data sheets must by typed individually if they are to gain the attention of personnel officials................ True False 13.____
14. Orientation periods are provided so that new employees can gain an understanding of the entire organization in which they will work .... True False 14.____
15. Supervisors do not have responsibility for evaluating clerical workers .... True False 15.____
16. Clerical workers are not likely to find further study valuable for their work in the job................ True False 16.____
17. Clerical workers should not assume that they will learn anything new on the job .... True False 17.____
18. Since all clerical jobs require the same amount of skill and responsibility, there are no opportunities for promotion in most companies................ True False 18.____
19. The projected employment for clerical occupations shows that few persons are likely to be employed as typists in the next ten years .... True False 19.____
20. Announcements for civil service positions are posted in post offices as well as in regional civil service offices .... True False 20.____
21. A blind advertisement tells you nothing about the nature of the job that is available................ True False 21.____
22. During an interview the applicant can expect to learn about the company and the position for which he or she is being considered................ True False 22.____
23. Companies expect new employees to understand their jobs thoroughly on their first day of work .... True False 23.____
24. Some companies provide tuition reimbursement for employees who wish to further their education................ True False 24.____
25. You should be able to predict the pattern of your career upon taking your first job .... True False 25.____

Score ____

SECTION C

INSTRUCTIONS: Column I lists qualities that successful office workers develop. Column II lists examples of behavior at work. Identify the attribute in Column I that is illustrated by the specific behavior in Column II, and write its *letter* in the Answers column. Some items in Column I may be used more than once.

COLUMN I

A. Adaptability
B. Confidence
C. Courtesy
D. Initiative
E. Punctuality
F. Responsibility

COLUMN II — Answers — For Scoring

1. Gets to work on time .... ____ 1.____
2. Never fails to leave a correct phone message................ ____ 2.____
3. Listens carefully to a demonstration of a new procedure and masters it quickly .... ____ 3.____
4. Works at normal pace even though supervisor has left the room .... ____ 4.____
5. Arrives for an interview at the scheduled time................ ____ 5.____
6. Takes evening courses in advanced subject matter................ ____ 6.____
7. Thanks the interviewer for the chance to talk with him or her .... ____ 7.____
8. Uses a new typewriter with ease when taking a performance test...... ____ 8.____
9. Talks naturally with the interviewer .... ____ 9.____
10. Completes a report on schedule .... ____ 10.____

Score ____

FINAL EXAMINATION

(Based on Units 9 through 16)

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Student ____________________

Class ____________________ Sections __________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	35	25	20	20	100
Student's Score					

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False" in the Answer column.

		Answers	For Scoring
1.	Personal mail is opened but not read by the mail clerk	True False	1. ____
2.	There is a different ZIP Code for each major geographic region in the United States	True False	2. ____
3.	Second-class mail consists of letters that are going out of state	True False	3. ____
4.	A typewritten report should be sent as third-class mail	True False	4. ____
5.	Packages are sent second-class	True False	5. ____
6.	Two pieces of mail of different classes may be mailed together as a single mailing	True False	6. ____
7.	The postage for a letter mailed from Miami, Florida, to Toronto, Ontario, would be the same as for one mailed to St. Louis, Missouri	True False	7. ____
8.	The person who wants a letter delivered immediately upon its receipt at the post office of destination should request registered mail service	True False	8. ____
9.	The United States Postal Service does not provide a collect-on-delivery service	True False	9. ____
10.	Chain feeding is a speedy way to type a large number of envelopes	True False	10. ____
11.	United Parcel Service handles packages of more than 100 pounds in weight	True False	11. ____
12.	Business data processing can be accomplished effectively only by computers	True False	12. ____
13.	Verifiers and collators are totally manually operated	True False	13. ____
14.	A program must be prepared to instruct the computer	True False	14. ____
15.	Sales slips are source documents	True False	15. ____
16.	Output data may take the form of monthly statements	True False	16. ____
17.	A flowchart is needed after a computer run to check the correctness of the completed job	True False	17. ____
18.	Data can be transmitted from machine to machine without human intervention	True False	18. ____
19.	There are machines that can "read" print	True False	19. ____
20.	The verifier is one of the machines in a unit record system	True False	20. ____
21.	Magnetic plastic tape is an input medium	True False	21. ____
22.	Photocopying is an inexpensive process if a large number of copies is needed	True False	22. ____
23.	Photocopiers can reproduce handwritten notations	True False	23. ____
24.	Collating can be done manually	True False	24. ____
25.	The fluid duplicator makes more attractive copies than does an offset duplicator	True False	25. ____
26.	Corrections can be made on an offset master with a razor blade	True False	26. ____
27.	A perpetual inventory system is used when a company wants to monitor its inventory continuously	True False	27. ____
28.	Manufacturing firms maintain goods in process inventories	True False	28. ____
29.	When accurate inventory records are maintained during the year, an annual count of stock is unnecessary	True False	29. ____
30.	A check should be dated with the date it is expected to reach the payee	True False	30. ____
31.	When a payment is made in advance, the next month's statement will show that amount in arrears	True False	31. ____
32.	Certified checks are the most commonly used means of payment for business transactions	True False	32. ____
33.	Money orders are available for payments within the United States only	True False	33. ____
34.	Two employees who have the same gross salary will always have the same net salary	True False	34. ____
35.	Clerical workers are found primarily in manufacturing companies	True False	35. ____

Score ________

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SECTION B

INSTRUCTIONS: Each statement below describes either a *good* practice or a *poor* practice. Indicate your answer by underlining or circling "Good" or "Poor" in the Answers column.

	Answers	For Scoring
1. Before sealing an envelope, the clerk checks to see that any enclosures noted at the end of a letter are in fact enclosed	Good Poor	1._____
2. An envelope is discarded as soon as a letter is opened	Good Poor	2._____
3. The mail department presorts volume mail	Good Poor	3._____
4. A small company that produces breakfast rolls in Seattle uses air express to get the rolls to Chicago and New York	Good Poor	4._____
5. The typist reads the offset master before removing it from the typewriter	Good Poor	5._____
6. The company expects each department head to be a purchasing agent for that department	Good Poor	6._____
7. The company has a policy that states that employees of the purchasing department may not accept gifts of any kind from vendors	Good Poor	7._____
8. Each employee is free to take from the stockroom the supplies needed	Good Poor	8._____
9. Requisition forms are signed by the person in the office that receives the supplies from the central supply stockroom	Good Poor	9._____
10. When a clerk checking the bank statement discovered that the balance on the statement didn't agree with the balance in the checkbook, the clerk immediately called the bank to tell the bank that it had made an error	Good Poor	10._____
11. The accounting department makes all payments for small purchases made in the other departments	Good Poor	11._____
12. One person is responsible for the entire payroll process	Good Poor	12._____
13. Cash is kept in a safe place for two or three weeks so that trips to the bank will not be made frequently	Good Poor	13._____
14. An announcement to be sent to customers is prepared on a fluid duplicator	Good Poor	14._____
15. A mail order clerk takes information from a customer who telephones to place an order by writing a quick note on a scrap sheet of paper	Good Poor	15._____
16. The payroll clerk uses a calculator to determine the net pay for each employee	Good Poor	16._____
17. Office workers feel no responsibility to be cooperative with customers since that is the job of the sales personnel in the company	Good Poor	17._____
18. A candidate for a job wrote a brief thank you letter the day after an interview	Good Poor	18._____
19. A candidate believed that extracurricular activities were not related to work and so left that portion of the application form blank	Good Poor	19._____
20. An applicant for a job had a carefully written letter of application duplicated by the offset process	Good Poor	20._____
21. A student talked with a counselor in the high school about job opportunities in the community.	Good Poor	21._____
22. A student interested in working in a particular company in a town about 200 miles away wrote a letter to the company asking if any jobs were available in her area of interest	Good Poor	22._____
23. A candidate for a position filled in an application form legibly	Good Poor	23._____
24. A candidate listened carefully to each question which the interviewer asked	Good Poor	24._____
25. Since the first day at work was to be spent in an orientation session, a beginning office worker decided to stay at home	Good Poor	25._____

Score ________

SECTION C

INSTRUCTIONS: In each of the following sentences, insert in the Answers column the term that best completes the sentence.

Answers — For Scoring

1. The form filled in when a customer telephones in an order is a/an .... ____________ 1.____
2. The form used by a supplier when goods are returned for some reason is a/an ____________ 2.____
3. The form filled in by a sales representative every time the representative visits a customer is a/an .... ____________ 3.____
4. The form used to obtain supplies from a central supplies stockroom is a/an.... ____________ 4.____
5. A special fund set aside to take care of small purchases is a/an .... ____________ 5.____
6. When a depositor writes a check on an account which does not contain sufficient funds to cover the full payment, the account is said to be..................... ____________ 6.____
7. A shipment for which cash is expected upon delivery is called .... ____________ 7.____
8. The FICA tax provides insurance for .... ____________ 8.____
9. An indorsement which includes only the indorser's signature is called a/an ... ____________ 9.____
10. A telephone call which is paid for by the party called is a/an .... ____________ 10.____
11. The type of letter written in response to a customer's complaint about an order is a/an... ____________ 11.____
12. The form filled in when checks and cash are taken to the bank to be added to a checking account is a/an .... ____________ 12.____
13. The type of check that is used most frequently for business payments is a/an . ____________ 13.____
14. The type of check that gives details about the purpose of the check is a/an ..... ____________ 14.____
15. The information included in a petty cash book for each expenditure includes the date of the payment, the amount and the.. ____________ 15.____
16. The original amount in the petty cash fund was $100.00. The payments for the past month totaled $92.59. The amount of the check to replenish the fund should be.. ____________ 16.____
17. The type of duplicator that can have either a paper or metal master is........... ____________ 17.____
18. Corrections on a fluid duplicator master are made with the aid of .... ____________ 18.____
19. A burnisher is an aid in making corrections on a/an .... ____________ 19.____
20. The mail classification of a letter to be sent from St. Louis to Phoenix would be... ____________ 20.____

Score ________

SECTION D

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column the *letter* corresponding to the item selected.

Answers For Scoring

1. The most common test that clerical workers take when they seek employment covers: (A) transcription, (B) English usage, (C) arithmetic skills, (D) typewriting ______ 1.____
2. The department within a large organization that is most likely to be responsible for selecting new clerical workers is the: (A) personnel department, (B) administrative services department, (C) operations department, (D) clerical department ______ 2.____
3. The interviewer is primarily interested in talking with a candidate to find out: (A) how large a salary the candidate expects to receive if hired, (B) how interested the candidate is in the position available, (C) how much the candidate knows about the business of the company, (D) how long the candidate will stay with the company if hired ______ 3.____
4. The most appropriate service to use when sending a package of ten pounds from Boston to Chicago is: (A) railway freight service, (B) United Parcel Service, (C) first-class mail service, (D) American Express transportation service ______ 4.____
5. The machine that determines if each card was punched accurately is the: (A) sorter, (B) card punch, (C) verifier, (D) checker ______ 5.____
6. An input medium for computers is: (A) sales slips with magnetic numbers, (B) paper with a sensitized finish, (C) magnetic tubes, (D) punched paper cards ______ 6.____
7. The section of the central processing unit which receives each instruction and determines the operation to be performed is the: (A) storage section, (B) direction section, (C) process section, (D) control section ______ 7.____
8. The machine that is most likely to be used for preparing monthly statements is the: (A) bookkeeping machine, (B) ten-key adding listing machine, (C) electronic printing calculator, (D) full-bank adding machine ______ 8.____
9. A business person who wanted a package to reach its destination as promptly as first-class mail would send it via: (A) special delivery, (B) registered mail service, (C) special handling, (D) certified mail service ______ 9.____
10. A follow-up file in the purchasing department is most likely to be organized by: (A) type of goods ordered, (B) name of the company from which goods were ordered, (C) expected date of delivery of goods, (D) department for which goods were ordered ______ 10.____
11. The receiving clerk checks the goods received against a copy of the: (A) purchase order, (B) packing list enclosed with the goods, (C) purchase requisition, (D) request for quotation ______ 11.____
12. To find the accumulated earnings for one employee in the company, the payroll clerk is most likely to check the: (A) payroll register, (B) employee's time card, (C) employee's W-4 form, (D) employee's earning record ______ 12.____
13. For duplicating 10,000 copies of a form to be used in the accounting department, the best duplicating process would probably be the: (A) offset process, (B) photocopying process, (C) stencil process, (D) fluid process ______ 13.____
14. The word spelled correctly is: (A) colume, (B) accommodate, (C) separete, (D) volumn ______ 14.____
15. The word spelled correctly is: (A) indices, (B) privilige, (C) lisence, (D) cight ______ 15.____
16. The word spelled correctly is: (A) intension, (B) efficiency, (C) masterfull, (D) conclucion ______ 16.____
17. Gross sales were $19,540; returns and allowances were $3,140. The net sales are: (A) $22,680, (B) $19,540, (C) $17,970, (D) $16,400 ______ 17.____
18. A sales invoice dated May 25 for $549.50 is subject to the terms 2/10, net 30. The amount of the check written on June 3 should be: (A) $549.50, (B) $538.52, (C) $538.51, (D) $439.60 ______ 18.____
19. An employee who earns $4.25 per hour worked 40 hours. The employee's gross earnings for the week were: (A) $1,700.00, (B) $1,690.00, (C) $170.00, (D) $17.00 ______ 19.____
20. An employee's gross earnings were $890.00. Deductions were: federal income tax, $121.50; FICA, $35.90. The employee's net earnings were: (A) $732.60, (B) $768.50, (C) $854.10, (D) $890.00 ______ 20.____

Score ______

1st SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Unit 1, Part 1 & 2	1	Unit 5, Part 1 & 2
2	Unit 1, Part 2 Unit 2, Part 1 & 2	2	Unit 5, Part 2 Test 4 Unit 6, Part 1 & 2
3	Unit 2, Part 3 Test 1	3	Unit 6, Part 2 & 3
4	Unit 3, Part 1 & 2	4	Unit 6, Part 4 Test 5 Unit 7, Part 1
5	Unit 3, Part 2 & 3	5	Unit 7, Part 2
6	Unit 3, Part 4 Test 2	6	Unit 7, Part 3 & 4
7	Unit 4, Part 1 & 2	7	Unit 7, Part 4 Unit 8, Part 1 & 2
8	Unit 4, Part 2 & 3	8	Unit 8, Part 2 & 3
9	Unit 4, Part 4 Test 3	9	Test 6 Review Mid-term Examination

2nd SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Unit 9, Part 1 & 2	1	Unit 12, Part 1 & 2 Unit 13, Part 1
2	Unit 9, Part 2 & 3	2	Unit 13, Part 1 & 2
3	Unit 9, Part 3 & 4 Test 7	3	Unit 13, Part 2 Unit 14, Part 1 & 2
4	Unit 10, Part 1 & 2	4	Unit 14, Part 2 Test 10 Unit 15, Part 1
5	Unit 10, Part 2 & 3	5	Unit 15, Part 2 & 3
6	Unit 10, Part 4 Test 8	6	Unit 15, Part 3 Test 11 Unit 16, Part 1
7	Unit 11, Part 1 & 2	7	Unit 16, Part 1, 2 & 3
8	Unit 11, Part 2, 3 & 4	8	Unit 16, Part 3 & 4
9	Unit 11, Part 4 Test 9	9	Test 12 Review Final Examination

Name ______________________

FIRST SEMESTER

First Quarter

	Total	Cum	Total Possible
Unit 1, Part 1			
Part 2			
Unit 2, Part 1			
Part 2			
Part 3			
Test 1			
Unit 3, Part 1			
Part 2			
Part 3			
Part 4			
Test 2			
Unit 4, Part 1			
Part 2			
Part 3			
Part 4			
Test 3			

Second Quarter

	Total	Cum	Total Possible
Unit 5, Part 1			
Part 2			
Test 4			
Unit 6, Part 1			
Part 2			
Part 3			
Part 4			
Test 5			
Unit 7, Part 1			
Part 2			
Part 3			
Part 4			
Unit 8, Part 1			
Part 2			
Part 3			
Test 6			
Mid-Term Exam			

Name ______________________

SECOND SEMESTER

Third Quarter			
	Total	Cum	Total Possible
Unit 9, Part 1			
Part 2			
Part 3			
Part 4			
Test 7			
Unit 10, Part 1			
Part 2			
Part 3			
Part 4			
Test 8			
Unit 11, Part 1			
Part 2			
Part 3			
Part 4			
Test 9			

Fourth Quarter			
	Total	Cum	Total Possible
Unit 12, Part 1			
Part 2			
Unit 13, Part 1			
Part 2			
Unit 14, Part 1			
Part 2			
Test 10			
Unit 15, Part 1			
Part 2			
Part 3			
Test 11			
Unit 16, Part 1			
Part 2			
Part 3			
Part 4			
Test 12			
FINAL EXAM			

SECRETARIAL OFFICE PROCEDURES

Secretarial Office Procedures
UNIT 1

Name ______________________
Period ______________________
Date Started ____________
Date Completed ____________
Grade ____________

THE SECRETARY

Objectives: The student will be aware of the:

1. nature of the secretarial position on the office workers' organizational ladder.
2. basic tasks of the secretary.
3. personal and professional qualities that are held in high esteem in the business community.
4. unique responsibilities of secretaries as compared with other office workers.

Materials Needed:

1. Typewriter
2. Dictionary and word division manual
3. Typing paper
4. Message forms

Maximum Time Allowed:

9 days - 3 days for each part

Paper Headings:

Type your Name on the BACK of each page
Course Title
Date

Head each assignment with the sale title as found in the Secretarial Office Procedures book - page number.

Procedures:

1. Read pages 2-14.
2. Type the answers to the following assignments:
    a. Respond to working with others - pg. 15
    b. Refreshing Language Skills - pg. 16
    c. Performing Secretarial Tasks - pg. 16 (One OR Two)
3. Read pages 17-27.
4. Type the answers to the following assignments:
    a. Refreshing Language Skills - pg. 28
    b. Performing Secretarial Tasks - pg. 28
    c. No. 2
    d. No. 3 (obtain message forms from instructor)

5. Read pages 30-38.
6. Type the answers to the following assignments:
    - a. Making Judgements - pg. 39 (One OR Two)
    - b. Working with Others - pg. 39
    - c. Performing Secretarial Tasks - pg. 40

Grading: Your work will be graded on the following items:

1. Attractive appearance of final copy
    - a. All errors neatly corrected
    - b. Clean and unwrinkled paper
    - c. Proper forms used when appropriate
2. Proper grammar use
3. Proper sentence and paragraph structure
4. Accuracy of assignment
    - a. Content
    - b. Correct answers

Secretarial Office Procedures

UNIT 2

Name ____________

Period ____________

Date Started ____________

Date Completed ____________

Grade ____________

THE SECRETARY AND WORD PROCESSING

Objectives: The student will:

1. be aware of the realistic manner in which dictation is recorded.
2. be aware that taking dictation is a cooperative activity and that the employer wants to be sure that the message is clear and complete so that accurate, attractive transcript can be prepared.
3. determine the order in which they transcribe the items given to them and how secretaries keep their work stations organized to facilitate transcribing.
4. demonstrate the common ways of handling completed transcripts.
5. be aware of the fact that cost-conscious firms find that using dictation equipment means savings in the administrative branch of their operations.
6. be aware of the fact that secretaries who have no experience with dictating and transcribing machines are not fully prepared for their jobs.

Materials Needed:

1. Transcribing equipment
2. Hitachi Sound Projector
3. Film strips and cassettes - Techniques for Proofreading and Making Corrections, Transcription Techniques
4. Film Review Sheets for the films in Item 3.
5. Dictation Tape for Secretarial Office Procedures, Unit 2, Problem No. 2 on page 54
6. Large sheet of colored poster board paper (furnished by student)
7. Office pictures - various sources
8. Recorder and blank tape

Maximum Time Allowed:

12 days

Procedures:

1. Read pages 42-52 (Part One).
2. Type the answers to Refreshing Language Skills - page 53. (Part One)

2a. Complete "Performing Secretarial Tasks" on page 54, No. 2.

3. Read pages 55-64 (Part Two).
4. Type the answers to the following:
   a. Refreshing Language Skills - pg. 66
   b. Performing Secretarial Tasks - pg. 67, Problem No. 3

5. Make a collage on a large sheet of poster board on one of the topics listed below. The collage will be displayed in the lab.
    a. Are You Ready To Begin Transcription? - A checklist of all the items that should be at the work station with attractive illustrations of each.
    b. From Notes to Mailable Letters - Notes of short letters illustrating special instructions, such as three carbons, blind copy to ---, check date of Thanksgiving holiday, etc., attached to finished transcripts.
    c. What The Secretary Missed . . . Would You? - A number of letters attractively typed but each containing at least one typographical or grammatical error. In addition, there should be a caption inviting each student to record all the errors noted. After about a week, superimpose red circles and red figures onto the letters and indicate the total number of errors.
6. Watch the film strip on "Techniques for Proofreading and Making Corrections."
    a. Information for operating the projector is available.
    b. Obtain the Review Sheet for the film.
7. Type your notes from the film on the Review Sheet. Submit for instructor's approval, the notes will be returned to you for further reference.
8. Read pages 68-77 (Part Three).
9. Complete "Performing Secretarial Tasks" page 79 according to the instructions in the book.
10. Submit each task for grading as you complete them.
11. Watch the film strip on "Transcription Techniques."
    a. Obtain the Review Sheet for the film.
    b. Follow directions in Item No. 7.
12. Take Unit Test when all papers have been returned for Units 1 and 2.

TEST 1

(Based on Units 1 and 2)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

Oliverio • Pasewark

South-Western Publishing Co.

Student ______________________

Class ______________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	20	10	20	50
Student's Score				

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False." Item No. 0 is given as an illustration.

Answers — For Scoring

0. As the business office becomes more automated, there is less need for secretaries .... True [✓ False] 0. ✓

1. The secretarial field is not open to men .... True False 1.____
2. At one time, there were many more male secretaries than female secretaries in American offices . True False 2.____
3. Secretaries seldom have to assume responsibility since they are generally supervised closely .. True False 3.____
4. A typist has a higher rank than a secretary in the modern office .... True False 4.____
5. Beginning workers learn much about their companies that will be valuable for higher level positions .... True False 5.____
6. The secretarial position is seldom a beginning position .... True False 6.____
7. A stenographer performs the same duties as a secretary .... True False 7.____
8. Few companies promote their own office workers into higher positions within the company . True False 8.____
9. Office workers with stenographic skills do not need to understand word processing systems . True False 9.____
10. Secretaries usually look for satisfactions beyond adequate pay in their jobs .... True False 10.____
11. Workers in the modern office dress more formally than such workers dressed a few decades ago . True False 11.____
12. Since the typewriter is a common machine in the modern office, secretaries do not need to pay attention to handwriting .... True False 12.____
13. Secretaries often reorganize their work stations in order to work more efficiently .... True False 13.____
14. There is no relationship between good health and one's eating habits .... True False 14.____
15. Office workers are able to work more effectively if they are cooperative .... True False 15.____
16. Secretarial positions are alike regardless of the type of organization in which a secretary works True False 16.____
17. Experienced secretaries are valued for their trustworthiness .... True False 17.____
18. Secretaries should take time to read bulletins sent to them from the various offices within their organizations .... True False 18.____
19. Secretaries have little opportunity to increase their productivity since they are assistants to executives .... True False 19.____
20. Non-profit organizations are concerned about productivity levels of their employees .... True False 20.____

Score________

SECTION B

INSTRUCTIONS: In each of the following sentences, select the phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the phrase selected. Item No. 0 is given as an example.

Answers — For Scoring

0. Secretarial salaries in the United States: (A) tend to be approximately the same in all parts of the country, (B) tend to vary in different parts of the country, (C) tend to be the same regardless of level of responsibility .... B 0. ✓

1. A competent secretary shows initiative: (A) by noting carefully all special instructions given by the employer, (B) by having a clear desk at the time the business day begins, (C) by anticipating the jobs that must be done .... ________ 1.____
2. A well-poised secretary is one who: (A) acts naturally and is at ease with people, (B) acts reserved and quiet in the presence of strangers, (C) acts as a leader in familiar situations .... ________ 2.____
3. Competent secretaries will: (A) check the dictionary for the spelling of a word of which they are not sure, (B) guess at the spelling of a word they don't know how to spell as a means of saving time, (C) ask their employer how the word is spelled .... ________ 3.____

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SECTION B (Continued)

Answers — For Scoring

4. When employers pause in dictation, secretaries: (A) should offer aid in resolving the problem of what to say, (B) should read their notes for editing, (C) should leave the room quietly and await the employer's call to return .... ______ 4.______
5. Good secretaries become acquainted with their employers' business in order: (A) to understand the job they do, (B) to be able to do the employers' job when they are out of town, (C) to be sure of getting a promotion in the company .... ______ 5.______
6. The secretary who is busy at the typewriter when the employer calls for dictation should: (A) complete the task being worked on before reporting for dictation, (B) ask a co-worker who is free to go into the employer's office for dictation, (C) enter the employer's office with notebook and pen . ______ 6.______
7. A secretary who notices that he or she must go to the files several times during every dictation period should: (A) anticipate the materials needed and have them with the correspondence to be answered, (B) suggest to the employer that a list of all materials needed for dictation be prepared, (C) suggest that dictation be postponed until the needed items can be assembled .... ______ 7.______
8. The secretary determines the length of a letter which is recorded on a dictating machine: (A) by quickly typing a rough draft using a standard 60-space line, (B) by noting the indication slip that accompanies the record, (C) by asking the employer how long the letter is .... ______ 8.______
9. The secretary who gives transcripts to the employer should: (A) have the carbon of each letter immediately under the original, (B) file the carbons in their proper places immediately, (C) mail out immediately any carbon copies that were designated for others .... ______ 9.______
10. Secretaries will handle correspondence satisfactorily if they: (A) have good command of the English language, (B) have an understanding of the messages to be answered, (C) both A and B .... ______ 10.______

Score__________

SECTION C

INSTRUCTIONS: You are to determine whether each of these statements reflects *good* behavior or *poor* behavior. If you think the behavior is good, underline or circle "good"; if you think it is poor, underline or circle "poor." Item No. 0 is given as an example.

Answers — For Scoring

0. Tom chooses his most comfortable beach attire for office wear .... Good [✓ Poor] 0. ✓

1. Gail spends much time talking with her friends when her employer is in conference .... Good Poor 1.______
2. Bill continues to use expressions such as "Get with it, kid" and "Hey, you're not altogether" in his communications with officers in the company where he works .... Good Poor 2.______
3. Harold doesn't worry about getting the reports to the next office on schedule .... Good Poor 3.______
4. Sally is careful not to begin a job that might not be completed by 5 p.m., which is the time when her day is over .... Good Poor 4.______
5. Roger maintains a list of new words which he checks in his dictionary and learns to use ..... Good Poor 5.______
6. In her spare time, Amy reads her employer's professional and trade publications .... Good Poor 6.______
7. Grace gets her employer a supply of tapes for the dictating machine as soon as the employer runs out .... Good Poor 7.______
8. Andy transcribes his notes as soon after the dictation as possible .... Good Poor 8.______
9. Donald uses his calendar to organize his work .... Good Poor 9.______
10. Roy finds he seldom has anything to do when his employer is out of town .... Good Poor 10.______
11. Wendy never asks her employer any questions about the dictation; she just tries to decide answers for herself .... Good Poor 11.______
12. Since Sandra knows shorthand, she refuses to transcribe from a machine .... Good Poor 12.______
13. Bob files materials only when there is nothing else to do .... Good Poor 13.______
14. Carol proofreads each transcript before she removes it from her typewriter .... Good Poor 14.______
15. Steve leaves spaces at the beginning of each item in his shorthand notebook so that he can record special instructions that may be dictated after the letter is begun .... Good Poor 15.______
16. Shirley makes any corrections needed on originals only .... Good Poor 16.______
17. Betsy feels that her work station should reflect her own personality so she has decorated it in much the same style as her own desk in her bedroom .... Good Poor 17.______
18. Jack takes time to establish priorities for the tasks that are to be completed each day .... Good Poor 18.______
19. Manuel notes on the original the name of the person who is to get a blind copy of the letter.. Good Poor 19.______
20. Marlene has developed a yearly calendar of activities for her office .... Good Poor 20.______

Score__________

Secretarial Office Procedures

UNIT 3 & 4

Name __________________________
Period ________________________
Date Started _______________
Date Completed _______________
Grade _______________

PREPARING MAILABLE LETTERS

Objectives: The student will be able to:

1. type a business letter without having to stop and think where certain parts of the letter should be placed.
2. begin developing the ability to attractively place a letter on the page the first time they try it.
3. estimate the placement of letters and envelopes on their own without the aid of the placement table.
4. use the two letter abbreviations for all states.
5. locate proper ZIP Codes for a given address in the ZIP Code Directory.
6. recognize the different weights and qualities of stationery, carbon paper, and copy sheets as well as envelopes and postal cards.

Materials Needed:

1. Typing paper
2. Carbon paper
3. Envelopes
4. Four different weights of typing paper
5. Four different weights of copy paper
6. Four different styles of envelopes
7. Two different weights of carbon paper

} obtained by the students in each class as a group assignment

Maximum Time Allowed:

9 days

Procedures:

1. Read pages 82-89 (Part One).
2. Type the answers to Reviewing on page 89.
3. Type your reply to Working with Others from page 89.
4. Type your answers to Refreshing Language Skills from page 89.
5. Answer Question 1 on page 90, Performing Secretarial Tasks
6. Submit answers to work from Part One to the instructor for grading.
7. Read page 92-104 (Part Two).

8. Type the sentences on page 105, Refreshing Language Skills, and be sure to underline the correct preposition.

9. Follow the directions on page 105 and 106 for Performing Secretarial Tasks and type the assignment for Problems 1 and 2b. If you are not sure how to head the second page for a two-page letter, check the Office Reference Manual.

10. Submit answers to work from Part Two to the instructor for grading.

11. Read pages 109-114 (Part Three).

12. Type your answers to Refreshing Language Skills from page 116.

13. Write out your answers to Performing Secretarial Tasks, Problem 1, page 117. Attach the tape from a calculator that you used to mathematically figure the answers.

14. Type the sample letter you would use to complete Improving Secretarial Skills on page 118.

15. Have the instructor dictate the letter addressed to Mr. Elder (teacher's manual page 33) to you for transcription. This letter may be dictated 10 words a minute slower than you are presently working on for proficiency.
    This letter should be transcribed in mailable form.
    The signature line will be the name of a student in the lab that will proofread your letter accurately. Then have that student proofread the letter and sign the "mailable" letter.

16. Submit answers to work from Part Three to the instructor for grading.

17. As a total class, obtain Items 4-7 in the Materials Needed section. On a separate sheet of paper, describe each item and explain when each item would be used. Be sure to explain the difference and usage of the samples within the same group.

    Submit this task as a project completed by the class with a list of names of the people that helped with the project.

18. Review the information you learned in this unit and prepare to take the Secretarial Office Procedures Test No. 2 on Unit 3.

19. Take the Secretarial Office Procedures Test No. 2 during your class period. Follow the directions on the test.

TEST 2

(Based on Unit 3)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

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Student ____________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	15	10	10	15	50
Student's Score					

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False."

		Answers	For Scoring
1.	All the words in the complimentary close are capitalized	True False	1.____
2.	The address in the letter should correspond exactly with the envelope address	True False	2.____
3.	Stationery used for the second page of a letter should be the same quality as the letterhead	True False	3.____
4.	The salutation always agrees with the attention line	True False	4.____
5.	To emphasize a particular point, a postscript may be used	True False	5.____
6.	The chief advantage of the interoffice memorandum is that it can be typed quickly	True False	6.____
7.	If a name appears in the letterhead, it need not be typed in the complimentary close	True False	7.____
8.	The open style of punctuation requires punctuation marks at the ends of the special lines of the letter	True False	8.____
9.	The use of a standard line length for all letters saves time for the secretary	True False	9.____
10.	Letters look best when the side margins are even and the bottom margin is slightly wider than the side margins	True False	10.____
11.	The salutation is eliminated in the simplified letter style	True False	11.____
12.	The ZIP Code number is typed between the names of the city and the state	True False	12.____
13.	Titles (Ms., Mr., Dr., etc), the salutation, the complimentary close, and the formal signature are usually omitted from the interoffice memorandum	True False	13.____
14.	Most interoffice memorandum forms have the words TO, FROM, DATE, and SUBJECT printed on them	True False	14.____
15.	The recipient of a letter forms an impression of the letter before beginning to read it	True False	15.____

Score________

SECTION B

INSTRUCTIONS: Identify each part of a business letter given below in Column II by selecting one of the terms in Column I and writing its *letter* in the Answers column. Item No. 0 is given as an example.

COLUMN I

A. Attention Line
B. Carbon Copy Notation
C. Complimentary Close
D. Date Line
E. Enclosure Notation
F. Inside Address
G. Mailing Notation
H. Postscript
I. Reference Initials
J. Salutation
K. Second Page Heading
L. Separate Cover Notation
M. Subject Line
N. Typed Signature and Title

	COLUMN II	Answers	For Scoring
0.	Ladies and Gentlemen	J	0. ✓
1.	Yours truly		1.____
2.	Attention Mr. Howard P. Duncan		2.____
3.	May 6, 19--		3.____
4.	gh		4.____
5.	Enclosures 2		5.____
6.	SUBJECT: Filing Systems		6.____
7.	Skills and Harper, Inc. 529 Seventh Avenue New York, NY 10001		7.____
8.	(Mrs.) Elizabeth Sosebee Assistant Personnel Director		8.____
9.	cc: Miss Gayle Jensen		9.____
10.	Sills and Harper, Inc.—2—May 6, 19—		10.____

Score________

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SECTION C

INSTRUCTIONS: Each statement below describes a *good* practice or a *poor* practice of a secretary. Indicate your decision on each by underlining or circling "Good" or "Poor" in each instance.

	Answers	For Scoring
1. The secretary types special notations, such as "Please Forward," in the lower left corner of the envelope	Good Poor	1. ____
2. The secretary uses the salutation "Dear Sir" when the letter is sent to a company	Good Poor	2. ____
3. The secretary includes a woman's title (Miss, Mrs., Ms.) when typing her name in the inside address	Good Poor	3. ____
4. The secretary types over errors made when typewriting letters	Good Poor	4. ____
5. The secretary types the inside address plus "Page 2" as the second page heading of a letter	Good Poor	5. ____
6. The secretary types the complimentary close two double spaces below the body of the letter	Good Poor	6. ____
7. The secretary indicates the number of enclosures after typewriting the word *Enclosures*	Good Poor	7. ____
8. The secretary uses the same quality of paper for all pages of a letter	Good Poor	8. ____
9. The secretary omits the ZIP Code from the inside address because it is not needed	Good Poor	9. ____
10. The secretary types the second and succeeding pages of a letter on letterhead paper	Good Poor	10. ____

Score________

SECTION D

INSTRUCTIONS: In each of the following sentences select the phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the phrase selected.

	Answers	For Scoring
1. A short message that is typed on the second line below all other notations is a/an: (A) mailing notation, (B) postscript, (C) enclosure notation, (D) separate mail notation	______	1. ____
2. A standard complimentary closing for a business letter is: (A) Affectionately yours, (B) Faithfully yours, (C) Sincerely yours, (D) Yours	______	2. ____
3. Business-size paper is: (A) 8½" × 5½", (B) 7¼" × 10½", (C) 8" × 10½", (D) 8½" × 11"	______	3. ____
4. The proper salutation to use in a letter addressed to a corporation is: (A) Dear Sirs, (B) Ladies and Gentlemen, (C) My dear General Motors, (D) Mesdames	______	4. ____
5. The most timesaving punctuation style for the special lines of a letter is: (A) closed punctuation, (B) mixed punctuation, (C) partial punctuation, (D) open punctuation	______	5. ____
6. The typed signature of the person writing the letter is typed: (A) on the second line below the complimentary close, (B) on the fifth line below the complimentary close, (C) on the fourth line below the complimentary close, (D) a double space below the complimentary close	______	6. ____
7. In the mixed style of punctuation: (A) a colon is typed after both the salutation and the complimentary close, (B) a colon is typed after the salutation and a comma after the complimentary close, (C) a comma is typed after the salutation and the complimentary close, (D) a colon is typed after the complimentary close and a comma after the salutation	______	7. ____
8. A letter with less than 100 words would be classified as: (A) a short letter, (B) a medium letter, (C) a long letter, (D) a two-page letter	______	8. ____
9. One characteristic of an interoffice memorandum is that: (A) it is not printed on a form, (B) it is sent outside the company, (C) it is an easy and quick way to communicate with other members of the company, (D) it is signed by the person writing it	______	9. ____
10. The inside address of a letter should be typed: (A) centered on the page, (B) even with the right margin, (C) at the left margin, (D) beginning at the center of the page	______	10. ____
11. On letters of more than one page, number all pages except the: (A) first page, (B) second page, (C) third page, (D) last page	______	11. ____
12. When a company name is typed as part of the signature lines of a letter, it is typed in all capital letters: (A) on the second line below the complimentary close, (B) on the third line below the complimentary close, (C) immediately below the typed signature, (D) immediately above the typed signature	______	12. ____
13. Letterhead paper should be used for: (A) all pages of a letter, (B) the first page of a letter only, (C) the carbon copy of the first page as well as the first page of the letter, (D) all pages of the carbon copy as well as all pages of the letter	______	13. ____
14. On an envelope, mailing notations should be typed: (A) centered on the envelope in all capital letters, (B) below the stamp in all capital letters, (C) below the return address in capital and lowercase letters, (D) in the bottom left corner in capital and lowercase letters	______	14. ____
15. In the block style letter, the date is typed: (A) beginning at the left margin, (B) beginning at the center of the page, (C) ending at the right margin, (D) centered	______	15. ____

Score________

Secretarial Office Procedures
UNIT 5

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

TYPEWRITING REPORTS

Objectives: The student will be able to:

1. state the eight steps from the original conception of the document to its typing in final form for distribution.
2. interpret proofreaders' marks and other corrections made on original copy.
3. use the reference manual to answer questions concerning the format of business report typing.
4. explain the twelve parts of a business report.
5. provide an example of statistical tabulation typing.
6. take and transcribe minutes of an organizational meeting.

Materials Needed:

8½" X 14" paper to complete Procedure No. 21

Maximum Time Allowed:

14 days
1 day to take the test

Procedures:

1. Read pages 148-155.
2. Type your answers to Reviewing on page 155.
3. Complete task No. 2 on page 157 of Performing Secretarial Tasks. Follow the directions given in the book.
4. Submit completed tasks from Part One to the instructor for grading.
5. Read pages 158-169.
6. Type your answers to Working with Others from page 169.
7. Type your answers to Refreshing Language Skills from page 170.
8. Complete tasks 1, 2, 3, and 4 of Performing Secretarial Tasks from pages 171 and 172.
9. Submit completed tasks from Part Two to the instructor for grading.
10. Read pages 173-182.
11. Type your answers to Reviewing from page 182.

12. Type your answers to Making Judgements, Problem 1 from page 182.
13. Type your answers to Working with Others from page 183.
14. Type your answers to Refreshing Language Skills from page 183.
15. Type your answers to task 1 OR 2 of Performing Secretarial Tasks from page 184.
16. Submit completed tasks from Part Three to the instructor for grading.
17. Read pages 186-198.
18. Type your answers to Reviewing from page 198.
19. Type your answers to Refreshing Language Skills from page 200.
20. Complete Objective No. 6.
21. Type task No. 2 from page 200 on Performing Secretarial Tasks.
22. Submit completed tasks from Part Four to the instructor for grading.
23. Take Test No. 4 during one class period.

TEST 4

(Based on Unit 5)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

Oliverio • Pasewark

South-Western Publishing Co.

Student ______________________

Class ______________________ Section __________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	9	15	7	19	50
Student's Score					

SECTION A

INSTRUCTIONS: Indicate the proofreaders' mark to be used for each correction in Column II by writing in the Answers column the *letter* of the correct mark in Column I. Item No. 0 is given as an example.

COLUMN I

A.]
B. stet
C. ʃ
D. ^
E. tr or ∿
F. [
G. ¶
H. $\overset{,}{\vee}$
I. no ¶
J. ≡ caps
K. ⌣

COLUMN II	Answers	For Scoring
0. Insert apostrophe	H	0. ✓
1. Insertion to be made		1.
2. Close up		2.
3. Move to left		3.
4. Paragraph		4.
5. Move to right		5.
6. Capitalize		6.
7. Delete		7.
8. Transpose		8.
9. Leave it as it was		9.

Score __________

SECTION B

INSTRUCTIONS: In the blank space at the end of each line, write the term defined, explained, or described by the statement.

	Answers	For Scoring
1. Symbols used to indicate corrections and revisions in rough drafts of reports are called		1.
2. Part of a report giving an overview of the material by listing the main topics or chapter headings with the page numbers is a/an		2.
3. The basic bookkeeping equation implied on a balance sheet is		3.
4. When income is greater than expenses, you have a/an		4.
5. The time covered by a financial statement is called the		5.
6. An agreement that can be enforced by law is called a/an		6.
7. A legal document which provides for the distribution of property after death is called a		7.
8. Official records of the actions taken and topics discussed at meetings are called		8.
9. The part of a report which lists all references used in the report as well as those references consulted which added substantiating information is called a/an		9.
10. A written declaration made under oath that the facts set forth are sworn to be true and correct is called a/an		10.
11. Vertical and horizontal margins for typed reports are determined by the		11.
12. An expression of appreciation, of honor, or of commemoration is usually framed in the form of a/an		12.
13. The style of a title in which the first line is longer than the second, and the second line longer than the third is		13.
14. Omissions in a quotation are shown by typing		14.
15. Alternating spaces and periods are called		15.

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Score __________

SECTION C

INSTRUCTIONS: In each of the following sentences, select the phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the phrase selected.

	Answers	For Scoring
1. In legal documents quantities are usually written: (A) in words, (B) in both words and figures, (C) in figures	_____	1.____
2. After the scope of the problem to be covered in a business report has been determined, the author prepares: (A) an appendix, (B) a summary, (C) an outline	_____	2.____
3. A financial statement which shows the progress of the business for the fiscal period stated in the heading is called a/an: (A) Balance Sheet, (B) Income Statement, (C) Statement of Retained Earnings	_____	3.____
4. If one part of a report outline is written as a complete sentence, the next part should be: (A) a sentence, (B) a phrase, (C) a word	_____	4.____
5. On financial statements, double lines typed beneath a figure indicate: (A) addition or subtraction, (B) deletions of figures, (C) the final figure of a column	_____	5.____
6. The financial statement which shows the financial condition of a company on a particular date is the: (A) Balance Sheet, (B) Total Assets, (C) Income Statement	_____	6.____
7. A formal, written instrument by which title to real property is conveyed from one person to another is called: (A) a bill of sale, (B) a deed, (C) a mortgage	_____	7.____

Score________

SECTION D

INSTRUCTIONS: You will either agree or disagree with the accuracy of each of the following statements. If you agree, indicate your answer by either underlining or circling "Yes"; if you disagree, indicate your answer by either underlining or circling "No."

	Answers	For Scoring
1. All footnotes are double-spaced	Yes No	1.____
2. You may X out material in the first draft of a report	Yes No	2.____
3. The use of topical headings means that the headings are written as complete sentences	Yes No	3.____
4. The summary of a report comes after the conclusion	Yes No	4.____
5. It is best to number all pages of the report at the same time after the entire report has been typed..	Yes No	5.____
6. Main headings are usually centered on the page	Yes No	6.____
7. The three parts of a Balance Sheet are assets, liabilities, and capital	Yes No	7.____
8. There is only one way to write a report	Yes No	8.____
9. The small Roman numeral "i" is typed on the title page of a report	Yes No	9.____
10. A manuscript in its final form should be single-spaced	Yes No	10.____
11. A second person should be asked to check an important report with the typist	Yes No	11.____
12. Minutes can be revised after they have been read and approved at a meeting	Yes No	12.____
13. The first draft of a report may be destroyed once you have typed the second draft	Yes No	13.____
14. When proofreading columns of figures, you should always read across the columns	Yes No	14.____
15. More than one heading or subheading is required in each section of an outline	Yes No	15.____
16. The drawing of a will should be entrusted only to a qualified attorney	Yes No	16.____
17. Material from other sources is frequently quoted in a business report to support the writer's point of view	Yes No	17.____
18. Footnotes provide the reader with sources of additional information about the contents of the report	Yes No	18.____
19. Material may be quoted from a government publication without permission	Yes No	19.____

Score________

Secretarial Office Procedures

UNIT 6

Name ________________________

Period ________________________

Date Started ______________

Date Completed ______________

Grade ______________

THE SECRETARY AND DATA PROCESSING

Objectives: The student will be able to:

1. recognize the importance of accurate typing for card punching and data processing.
2. understand the concept of keyboarding for input machine of computers.
3. recognize a word processing unit and its function in today's office.
4. operate the ten-key calculators using the touch system.
5. type on various business forms.
6. better understand how so many records connected with their daily lives are processed by the use of electronic or punched card machines.

Materials Needed:

1. Sales invoice
2. Purchase requisition
3. Statement of account

Maximum Time Allowed:

10 days

Procedures:

1. Read pages 208-218 (Part One).
2. Type the answers to Refreshing Language Skills page 220.
3. Type the answers to Performing Secretarial Tasks page 221, No. 2.
4. Type your answer to Performing Secretarial Tasks page 221, No. 1, (Bonus).
5. Submit answers to work from Part One to the instructor for grading.
6. Read pages 222-230 (Part Two).
7. Type the answers to Making Judgements, page 231.
8. Type your reply to Working with Others from page 231.
9. Submit answers to work from Part Two to the instructor for grading.
10. Read pages 233-242 (Part Three).
11. Type the forms for Performing Secretarial Tasks from page 244, Nos. 1, 2, and 3. (FORMS PROVIDED)

12. Type the form from Performing Secretarial Tasks from page 245, No. 4.
13. Go on to Secretarial Office Procedures, Unit 7. Units 6 and 7 will be combined on Test 5.

STATEMENT OF ACCOUNT 191

Terrell Luggage Shop

868 APPLE AVENUE CANTON, DE 19935

To:

Date:

Date	Code	Division	Charges	Credits	Balance Due

STATEMENT OF ACCOUNT

Terrell Luggage Shop

868 APPLE AVENUE CANTON, DE 19935

To:

Date:

Date	Code	Division	Charges	Credits	Balance Due
		DUPLICATE			

PURCHASE REQUISITION

HOWELL & ASSOCIATES

Glenville, WI 54013

Deliver To:

Requisition No.:

Location:

Date Issued:

Job No.:

Date Required:

Approved By:

Quantity	Description	Unit Price	Amount

Department Supervisor

PURCHASE REQUISITION

HOWELL & ASSOCIATES

Glenville, WI 54013

Deliver To:

Requisition No.:

Location:

Date Issued:

Job No.:

Date Required:

Approved By:

Quantity	Description	Unit Price	Amount
	DUPLICATE		

Department Supervisor

SALES INVOICE

Fancy Fragrances MANUFACTURING COMPANY

1505 North Berry Road Bloomingdale, PA 18911

Sold To:

Date:
Our Invoice No.:
Your Invoice No.:
Shipped By:
Terms:

Quantity	Descriptions	Cat. No.	Unit Price	Amount
Checked By		Salesperson		

SALES INVOICE

Fancy Fragrances MANUFACTURING COMPANY

1505 North Berry Road Bloomingdale, PA 18911

Sold To:

Date:
Our Invoice No.:
Your Invoice No.:
Shipped By:
Terms:

Quantity	Descriptions	Cat. No.	Unit Price	Amount
	DUPLICATE			
Checked By		Salesperson		

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Secretarial Office Procedures

Name ______________________________
Period __________________________
Date Started ______________
Date Completed ______________
Grade ______________

HITACHI SOUND PROJECTOR

Objectives: The student will be able to:

1. properly insert the film strip in the projector.
2. properly insert the cassette in the projector.
3. properly operate all the functions of the projector.
4. properly return all materials used in this lesson to their storage.

Materials Needed:

1. Hitachi Sound Projector
2. Film strip
3. Film strip cassette
4. Headphones
5. Review sheet for specific film strip

Procedures:

1. Plug the projector into a three prong outlet.
2. Push the eject button on the front of the projector. The cassette door will open.
3. Insert the cassette with tape side on top and label side (A) facing you. Push the cassette door closed.
4. Push the "play" button down. If the cassette will not play, you may need to rewind the tape ("rew" button) or you have inserted the wrong side of the cassette. Check to make sure the tape is working, then stop the cassette with the "stop" button.
5. To install the film strip, complete the following steps.
    a. Look at the plastic window with Hitachi printed on it.
    b. Push down on the tab marked "open". The window will fall down.
    c. Feed the start of the film strip into the black box in middle of the window until the tape stops. Do NOT insert the strip into the slot on the right side.
    d. Turn the lamp on in the projector with the lamp switch located on the side of the projector.
    e. Advance the film to start frame by pushing on the "Film Advance" button which is located on the front of the projector. Hold the button down until you see the start frame.

5. Continued
    f. Align the start frame by pushing in and rolling away from you the top knob located on the side of the projector.
    g. Once the frame is aligned, advance the film to "Focus" frame. To focus the picture move the silver lever, which is located in the back of the projector, up or down to focus.
6. Insert the headphone plug on the side of the projector in the hole labeled "phone".
7. You will control the volume with the second knob from the top on the side of the projector.
8. Now advance the film to title frame and then start the cassette.
9. Advance the film strip by depressing the film advance button on the front of the machine once each time the "beep" tone sounds on the cassette tape.
10. You may stop the cassette at anytime during the presentation by just depressing the "stop" button.
11. You are to listen to the cassette and watch the film strip. Please take notes on the Review Topic Sheets provided for your particular lesson.
12. When you finish with the film strip, rewind it by hand and put it in the plastic container. Rewind the cassette by depressing the "rew" button.
13. When the cassette is rewound, put it back in the plastic container.
14. Unplug the headphone, wrap the cord and secure it with a rubber band. Return the headphone to its proper storage place.
15. Turn the lamp off in the projector, cover the projector and return it to its proper storage place.
16. Return the cassette and film strip to their proper storage.
17. Your individual unit directions will explain what you are to do with your completed Review Sheet.

Secretarial Office Procedures
REVIEW SHEET

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

TECHNIQUES FOR PROOFREADING AND MAKING CORRECTIONS

Directions: Watch the film strip on the above topic. Take notes on the following items. Take your notes on a separate piece of paper and then transcribe your notes on this paper at the typewriter. Be sure to correct all your errors.

WHO IS RESPONSIBLE FOR PROOFREADING COPIES?

EXPLAIN THE FOLLOWING SYMBOLS:

∼ TR

#

⬭ sp

(?)

$\underset{,}{\wedge}$

WHEN DO YOU PROOFREAD A PAPER?

WHY?

HOW?

HOW MANY TIMES DO YOU PROOF A BUSINESS REPORT?

WHAT ARE YOU LOOKING FOR IN EACH STEP?

WHAT IS A GALLEY?

HOW DO YOU PROOF A LEGAL DOCUMENT?

WHAT ARE THE STEPS YOU FOLLOW IN MAKING CORRECTIONS BY THE FOLLOWING METHODS:
(Be Brief)

ERASER

CORRECTION FLUID

CHALK TAPE

CARBON COPY

STENCIL

DITTO

Secretarial Office Procedures

REVIEW SHEET

Name ______________________

Period ______________________

Date Started ______________

Date Completed ______________

Grade ______________

TRANSCRIPTION TECHNIQUES

Directions: Watch the film strip on the above topic. Take notes on the following items. Take your notes on a separate piece of paper and then transcribe your notes on this paper at the typewriter. Be sure to correct all your errors.

WHEN DO EMPLOYERS PREPARE THEIR DICTATION?

WHAT PAGE IS THE LETTER PLACEMENT GUIDE ON IN YOUR REFERENCE MANUAL?

WHAT IS A CARBON PACK?

WHAT FUNCTION DO THE FOLLOWING CONTROLS PERFORM?

VOLUME -

TONE -

SPEED -

WHEN DO YOU SCAN A LETTER?

When transcribing - LISTEN STOP TYPE

EXPLAIN THE USE OF THE THREE PARTS OF THE FOOT PEDAL

A	B	C

A

B

C

WHEN DO YOU PROOFREAD?

WHAT ORDER DO YOU LEAVE YOUR TRANSCRIBED MATERIAL IN WHEN GIVING THEM TO THE DICTATOR?

WHAT DO YOU DO WITH THE CASSETTE WHEN YOU ARE FINISHED?

HOW DO YOU EDIT YOUR NOTES?

HOW DO YOU DETERMINE THE NUMBER OF WORDS IN A LETTER?

HOW DO YOU PLACE YOUR NOTEBOOK NEXT TO YOUR TYPEWRITER?

LIST THE EIGHT ITEMS OF GOOD DICTATION PRACTICE:

LIST THE SEVEN ITEMS OF EFFICIENT DICTATION:

Secretarial Office Procedures
UNIT 7

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

USING MAIL AND SHIPPING SERVICES

Objectives: The student will be able to:

1. know what time during the day would be the congested times at the Post Office and how to possibly eliminate part of that problem.
2. state reasons for using the proper ZIP Code on all addresses.
3. state the procedures for opening, dating and annotating incoming mail.
4. state different classes for handling outgoing mail.
5. chain feed envelopes.
6. be aware of the pamphlet, "How to package and wrap parcels for mailing".
7. be aware of air and surface shipping for parcels.

Materials Needed:

1. Registered mail form
2. Film strip - Processing Incoming and Outgoing Mail

Maximum Time Allowed:

10 days
1 day to take the test

Procedures:

1. Read pages 248-254. Watch the film strip.
2. Type your answers to Making Judgements from page 256.
3. Type your answers to Working with Others from page 257.
4. Type your answers to Refreshing Language Skills page 257.
5. Complete tasks 1 and 2 from page 258 of Performing Secretarial Tasks.
6. Submit completed tasks from Part One to the instructor for grading.
7. Read pages 260-274.
8. Type your answers to Reviewing from pages 274.
9. Type your answers to Problems 4 and 5 from pages 276 and 277 of Performing Secretarial Tasks.
10. Submit completed tasks from Part Two to the instructor for grading.

11. Read pages 278 - 283.
12. Type your answers to Working with Others from page 284.
13. Type your answers to Refreshing Language Skills from page 284.
14. Complete tasks 1 and 2 from page 285 of Performing Secretarial Tasks. Problem 1 is to be typed.
15. Properly wrap and address a package for mailing.
16. Take Test No. 5 during one class period.

REGISTER OF MAIL EXPECTED UNDER SEPARATE COVER

DATE OF ENTRY	ARTICLE	SENDER	DATE SENT	DEPARTMENT	INDIVIDUAL	DATE RECEIVED

REGISTER OF INSURED, SPECIAL DELIVERY, AND REGISTERED MAIL

RECEIVED		FROM		FOR	TYPE OF MAIL RECEIVED
DATE	TIME	NAME	ADDRESS	DEPARTMENT OR INDIVIDUAL	

TEST 5

(Based on Units 6 and 7)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

Oliverio • Pasewark

South-Western Publishing Co.

Student ____________________

Class __________ __________ Section __________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	20	15	15	50
Student's Score				

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either Yes or No. Indicate your answer by underlining or circling either "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Does the electronic method of processing data combine the talents of people with the speed and accuracy of computers?	Yes No	1. ____
2. Is data processing a new business activity?	Yes No	2. ____
3. Does the term *data processing* mean the arranging of words, numbers, and symbols to provide information?	Yes No	3. ____
4. Should a ten-key listing machine be operated by touch?	Yes No	4. ____
5. Can an output document be a punched card?	Yes No	5. ____
6. Should card verifying be done by the operator who punched the cards originally?	Yes No	6. ____
7. Are the three outstanding advantages of an electronic data processing system speed, accuracy, and storage?	Yes No	7. ____
8. Are ten-key listing machines used primarily for multiplication and division?	Yes No	8. ____
9. Can the computer retain information put into it for future reference?	Yes No	9. ____
10. Since computers work so quickly and accurately, is the need for human beings in business today reduced?	Yes No	10. ____
11. Does almost every operation in a business depend upon some kind of business form?	Yes No	11. ____
12. Do accounting machines have a central processing unit?	Yes No	12. ____
13. Is there an approved list of two-letter state abbreviations that should be used along with the ZIP Code on envelope addresses?	Yes No	13. ____
14. Does United Parcel Service include the picking up of small packages weighing more than 50 pounds?	Yes No	14. ____
15. Are carbon copies and photocopies of letters sent as second-class mail?	Yes No	15. ____
16. After an incoming letter has been checked for enclosures, return address, and signature, is it stamped with the date and the time?	Yes No	16. ____
17. Are the rates for parcel post determined by two factors: (1) the weight, and (2) the distance of delivery?	Yes No	17. ____
18. After a letter is opened, should the envelope be destroyed immediately?	Yes No	18. ____
19. Is the first-class mail rate to Canada and Mexico the same as the United States domestic rate?	Yes No	19. ____
20. Do most bus lines throughout the country offer package express service?	Yes No	20. ____

Score ____

SECTION B

INSTRUCTIONS: In each of the following sentences, select the phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the phrase selected.

	Answers	For Scoring
1. The holes in a punched card represent: (A) data (numbers, symbols, and words), (B) storage, (C) documents	____	1. ____
2. The Process Section of a computer: (A) manipulates (adds, subtracts, multiplies, and divides) the data, (B) stores the data, (C) sorts the data	____	2. ____
3. Bookkeeping machines are also known as: (A) invoicing machines, (B) sorting machines, (C) billing machines	____	3. ____
4. The meter of the postage machine is set for the amount paid, (A) in the mail room, (B) in the purchasing department, (C) at the post office	____	4. ____
5. If you processed some of the data by hand and some by tabulating machines, you would be using the: (A) manual method of processing data, (B) mechanical method of processing data, (C) tabulating method of processing data	____	5. ____

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SECTION B (Continued)

Answers — For Scoring

6. Forms which are to be filled out on a typewriter should be designed to take advantage of the: (A) variable line spacer, (B) spacing and tabular mechanisms, (C) marginal release key and paper release lever .... ______ 6. ______

7. The name and address on a business form are usually typed within a specified area to permit: (A) the use of geographic filing, (B) the use of a window envelope, (C) the use of an electric typewriter .... ______ 7. ______

8. The term that is *not* another name for the unit record system is: (A) tabulating system, (B) collating system, (C) punched card system .... ______ 8. ______

9. The electronic printing calculator is preferred by many accountants because: (A) it is better suited for adding and subtracting, (B) it is completely noiseless, (C) the tape can be forwarded with the source material from which the computations were made .... ______ 9. ______

10. The purpose of a card punch machine is to: (A) duplicate information, (B) verify information, (C) transfer data onto a card using a punched hole .... ______ 10. ______

11. Forms should be printed so that as many lines as possible start at: (A) the left margin and all tabular stops, (B) the right margin and all tabular stops, (C) all tabular stops .... ______ 11. ______

12. The purpose of a verifier is to: (A) punch the cards, (B) check the original card punching, (C) sort the cards .... ______ 12. ______

13. The main advantage of the ten-key listing machine is that: (A) you can learn to operate it using the touch method, (B) it is portable, (C) you depress each key separately .... ______ 13. ______

14. The earliest "device" for processing data was the: (A) computer, (B) human mind, (C) calculator. ______ 14. ______

15. The advantages of air express include: (A) speed of transportation, (B) speed of transportation and special pick-up service, (C) speed of transporation and special pick-up and delivery service. ______ 15. ______

Score______

SECTION C

INSTRUCTIONS: Identify each of the mailing definitions given in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column. No term in Column I is used more than once and some are no used at all. Item No. 0 is given as an example.

COLUMN I

A. Airmail
B. Annotating mail
C. Certified mail
D. COD service
E. Computing addressing
F. First-class mail
G. Insured mail
H. Mailing list
I. Optical Character Reader
J. Parcel post
K. Postage meter meter
L. *Postal Service Manual*
M. Recalling mail
N. Registered mail
O. Second-class mail
P. Special delivery
Q. Special handling
R. Third-class mail
S. Tracing mail
T. ZIP Code

COLUMN II	Answers	For Scoring
0. Mailing manual published by the federal government	L	0. ✓
1. Automatically prints the amount of postage, postmark, and date ...	______	1. ______
2. Equipment that can read printed or typewritten addresses	______	2. ______
3. Gives protection to valuable and important mail	______	3. ______
4. Provides a receipt for the sender and a record of delivery of mail with no value of its own	______	4. ______
5. Writing answers and comments in the margin of incoming mail....	______	5. ______
6. Five-digit number that identifies the destination of a piece of mail..	______	6. ______
7. Service by which first-class mail will be delivered immediately upon its receipt at the post office at the point of destination	______	7. ______
8. Books, catalogs, circulars, advertisements, and miscellaneous printed matter weighing not more than 16 ounces	______	8. ______
9. Also known as fourth-class mail	______	9. ______
10. The post office will reimburse you if the parcel is lost or damaged..	______	10. ______
11. Fourth-class mail delivered as fast as first-class mail	______	11. ______
12. Mail sealed or otherwise closed against inspection	______	12. ______
13. Service whereby purchaser pays for an item when it is delivered ...	______	13. ______
14. Newspapers and magazines	______	14. ______
15. Written request to locate mail not delivered within a reasonable time.	______	15. ______

Score______

Secretarial Office Procedures
UNIT 8

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

MEETING THE PUBLIC

Objectives: The student will be able to:

1. state the importance of business manners and business speech in the interactions between the secretary and the public.
2. recognize the essentials of successful person-to-person communicating.
3. demonstrate pleasant and considerate mannerisms when meeting the public.

Materials Needed:

1. Ask your instructor to order the film, "Communicating with the Public", M-919, 12 minute, color, 1970.
2. Appointment sheets
3. Tape recorder and one tape per group

Maximum Time Allowed:

5 days
1 day to take the test

Procedures:

1. Read pages 288-298.
2. Type your answers to Making Judgements, page 299, Problems 1, 2, and 3. All these answers may be typed on one sheet of paper.
3. Type your answers to Refreshing Language Skills, page 300, on the same sheet as number 2. Be sure to use complete sentences.
4. Complete task 1 of Performing Secretarial Tasks, page 301, on the form provided.
5. Read Problem 2 on page 302. As a class record your response to at least one of the four incidents. Complete as many tasks as necessary to allow all participants an opportunity to play a role.
6. Submit all tasks in Part One to your instructor for grading.
7. Ask to watch the film, "Communicating with the Public," when it arrives. Take notes on the film and then transcribe your notes at the typewriter and submit to your instructor.
8. Read pages 303-310.
9. Type your answers to Reviewing, page 310.
10. Complete Problem 1, Performing Secretarial Tasks, page 312. Be sure to include the name of the presentor, time, place and topic of presentation.

11. On same sheet of paper, as Item 10, complete task No. 2 from page 312.
12. Type your outline to Problem 2, Improving Secretarial Skills, page 312.
13. Submit work from Part Two to your instructor for grading.
14. Study the information learned in this chapter.
15. Take Test No. 6 during one class period.

APPOINTMENTS FOR ____________________

TIME	ENGAGEMENTS	MEMORANDUMS
9:00		
9:30		
10:00		
10:30		
11:00		
11:30		
12:00		
12:30		
1:00		
1:30		
2:00		
2:30		
3:00		
3:30		
4:00		
4:30		
5:00		
5:30		

TEST 6

(Based on Unit 8)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

Oliverio • Pasewark

South-Western Publishing Co.

Student ____________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	25	15	10	50
Student's Score				

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False."

	Answers	For Scoring
1. There is no relationship between thinking and speaking	True False	1.____
2. A pleasing voice requires control of breathing	True False	2.____
3. A voice registers emotions	True False	3.____
4. A secretary needs to develop an affected style of speech to be a successful receptionist	True False	4.____
5. The same degree of tact and good judgment is required in dealing with office personnel as with office visitors	True False	5.____
6. The secretary is sometimes expected to aid the executive in concluding a conference with a visitor	True False	6.____
7. The use of slang reflects a command of formal English	True False	7.____
8. All gestures and facial expressions should be avoided in office communication	True False	8.____
9. A secretary who understands the job completely is justified in being indifferent to callers	True False	9.____
10. The phone number of a person requesting an appointment should be recorded by the secretary.	True False	10.____
11. Saying "lemme" for "let me" is an example of poor enunciation	True False	11.____
12. Good manners can hide a secretary's attitude of indifference	True False	12.____
13. If a caller is rude, the secretary must also behave in a rude fashion	True False	13.____
14. When an appointment is scheduled for a room other than the executive's office, the secretary should check on the condition of the room prior to the time of the conference	True False	14.____
15. A secretary need not maintain a calendar if the employer keeps an accurate calendar	True False	15.____
16. A secretary should confirm every appointment with the employer	True False	16.____
17. Appointments of a personal nature may appear on the executive's calendar	True False	17.____
18. A secretary is expected to call the persons whose appointments must be canceled	True False	18.____
19. The employer's appointment record should include appointments away from the office	True False	19.____
20. Members of a group should understand the purpose of all meetings of their group	True False	20.____
21. A good chairperson will discourage full discussion since it is too time-consuming	True False	21.____
22. All individuals who call at a business office must have scheduled appointments	True False	22.____
23. The secretary should complete the task he or she has begun before acknowledging the arrival of a caller	True False	23.____
24. The secretary should introduce a new caller to the executive	True False	24.____
25. Secretaries are often responsible for keeping a card file of callers up to date	True False	25.____

Score________

SECTION B

INSTRUCTIONS: You are to determine if each statement reflects *good* behavior or *poor* behavior on the part of a secretary acting as a receptionist. If you think the behavior is good, indicate your answer by either underlining or circling "Good"; if you think it is poor, indicate your answer by underlining or circling "Poor."

	Answers	For Scoring
1. The secretary doesn't begin any jobs that require typewriting during the first two hours each morning because there are so many callers during this period	Good Poor	1.____
2. The secretary motions toward the executive's office and tells a new caller to "just go on in."	Good Poor	2.____
3. The secretary is acquainted with all regular visitors to the office	Good Poor	3.____
4. The secretary asks the telephone caller for whom an appointment was scheduled for his or her full name, address, business affiliation, and telephone number	Good Poor	4.____
5. The secretary has to leave the office, but before leaving informs the executive that a caller will arrive in about fifteen minutes	Good Poor	5.____

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SECTION B (Continued)

Answers For Scoring

6. The secretary maintains a card file of regular callers .... Good Poor 6.____
7. The secretary assumes that the executive reads the secretary's calendar to learn of the appointments made for the executive .... Good Poor 7.____
8. The secretary informs the executive that the person who has the next appointment has arrived. Good Poor 8.____
9. The secretary invites visitors to be seated if they must wait .... Good Poor 9.____
10. The secretary assumes that the executive isn't busy if there is no one in the executive's office, so callers are directed to go in immediately upon arrival .... Good Poor 10.____
11. Because the caller has not made an appointment, the secretary says that there is no possibility of talking to the executive at this time .... Good Poor 11.____
12. The secretary who couldn't determine what a caller wanted took the caller to the executive's door and asked the executive to find out if an appointment was justified .... Good Poor 12.____
13. The secretary checks the exective's calendar to be sure all the appointments scheduled for the day are on both of their calendars .... Good Poor 13.____
14. The secretary puts a reminder on the executive's desk of forthcoming appointments that will require preliminary work .... Good Poor 14.____
15. The secretary inquires about the background of the group for which a presentation is to be prepared .... Good Poor 15.____

Score________

SECTION C

INSTRUCTIONS: In each of the following sentences, select the phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the phrase selected.

Answers For Scoring

1. The caller's first impression of the secretary is largely related to the way in which the secretary: (A) typewrites, (B) arranges flowers, (C) takes dictation, (D) talks .... ______ 1.____
2. The precision with which you say each word is known as: (A) enunciation, (B) pronounciation, (C) colloquialism, (D) diction .... ______ 2.____
3. Most general rules for handling callers must be applied with the awareness that: (A) they must never be broken, (B) they really don't apply to people that the secretary likes, (C) they will not serve some situations from time to time, (D) they reflect the fact that visitors interrupt the work of the office .... ______ 3.____
4. When an unfamiliar caller approaches the secretary's desk, the secretary should say: (A) "Who are you, please?" (B) "Good morning, may I help you?" (C) "Good morning. You don't by any chance have an appointment now, do you?" (D) "Hi! Am I supposed to know you?" .... ______ 4.____
5. The use of slang in the office: (A) gives an informal, friendly tone to one's conversation, (B) reflects a weak language background, (C) reflects an awareness of the language of the day, (D) reflects a young personality .... ______ 5.____
6. If the executive has asked to be alerted when the next visitor arrives, the secretary should: (A) step into the executive's office a little before the scheduled time and say, "Mrs. Holmes, Mr. Smith, who has a 10 a.m. appointment with you is here," (B) ask Mr. Smith to go into Mrs. Holmes' office at the scheduled time, (C) forget about the request, because the person with the earlier appointment is still talking with Mrs. Holmes, (D) step into the executive's offfice at the scheduled time and say, "You told me to tell you when your appointment should end so that you could talk with Mr. Smith. He is here now." .... ______ 6.____
7. You should be as gracious and sincere when you bid the visitor good-bye as you were when you said hello: (A) if the caller did not overstay the appointment, (B) if your employer seemed to have gotten along well with the caller, (C) no matter how or when the appointment ends, (D) if you are not busy with other office work .... ______ 7.____
8. Courtesy requires that the secretary be a: (A) calm person, (B) good listener, (C) brilliant conversationalist, (D) person with an outgoing personality .... ______ 8.____
9. A person is said to have an affected way of speaking when he or she: (A) speaks in a manner that is not natural, (B) speaks slowly and cautiously, (C) speaks naturally and easily, (D) speaks louder than is necessary .... ______ 9.____
10. If a caller arrives early for an appointment, the secretary should: (A) say that the caller is early and may wish to walk around the building, (B) ask the caller to be seated and indicate when the caller can expect to see the executive, (C) ask the caller to be seated and then sit down to chat while he or she waits, (D) ignore the caller until it is time for the appointment .... ______ 10.____

Score________

MIDTERM EXAMINATION

(Based on Units 1 through 8)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

Oliverio • Pasewark

South-Western Publishing Co.

Student ____________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	25	25	25	25	100
Student's Score					

SECTION A

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False" in the Answers column at the right.

	Answers	For Scoring
1. Word processing never involves editing by the secretary	True False	1.____
2. The *you* attitude is useful in informal personal writing but not in regular business writing	True False	2.____
3. Secretaries are seldom expected to write routine letters for their employers	True False	3.____
4. A secretary should be noncommittal in a letter of acknowledgment	True False	4.____
5. Form letters are considered to be in poor taste in the modern business office	True False	5.____
6. A letter of inquiry is one that requests information	True False	6.____
7. Trite words convey the seriousness of the message	True False	7.____
8. A good letter will contain little specific information	True False	8.____
9. It is a good idea to type the date in a letter in the form of 11/13/7–	True False	9.____
10. Paper for carbon copies is usually of a lighter weight than letterhead paper	True False	10.____
11. Using a standard line length for all letters simplifies the typing of letters	True False	11.____
12. All letters should be signed before they are mailed	True False	12.____
13. A secretary who signs the name of the executive should place his or her initials under the signature	True False	13.____
14. Rough drafts of business reports should be single-spaced to save paper	True False	14.____
15. The date is not necessary on interoffice memorandums	True False	15.____
16. Window envelopes save time	True False	16.____
17. If a letter is to be sent by registered mail, the secretary should type REGISTERED MAIL in the lower left-hand corner of the envelope	True False	17.____
18. State names should be abbreviated and typed in capital letters when used with ZIP Code numbers	True False	18.____
19. Metered mail is processed quicker than mail with stamps on it	True False	19.____
20. Secretaries are not eligible to become notary publics	True False	20.____
21. Legal documents are often typed on special paper that is longer than regular typewriting paper	True False	21.____
22. In the busy world of the office, it is not necessary to say "good-bye" at the end of a telephone conversation	True False	22.____
23. The secretary should ask all telephone callers to come to the office to make appointments	True False	23.____
24. Since the secretary does not work directly with the computer, there is no need to understand the vocabulary of data processing	True False	24.____
25. Sophisticated equipment has made word processing in business more efficient	True False	25.____

Score________

SECTION B

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Would a secretary who must take minutes at meetings find it helpful to read *Robert's Rules of Order?*	Yes No	1.____
2. Does a letter of transmittal accompany a report?	Yes No	2.____
3. Are introductory parts of a report numbered with Arabic numbers?	Yes No	3.____
4. Is a title page an optional page in a report?	Yes No	4.____
5. Is the final copy of a manuscript double-spaced?	Yes No	5.____
6. Is a page number typed on the title page of a report?	Yes No	6.____

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SECTION B (Continued)

	Answers	For Scoring
7. Initiative is *not* an essential secretarial trait	Yes No	7.______
8. Can a computer be used for addressing envelopes?	Yes No	8.______
9. May a first-class letter be attached to a package for mailing?	Yes No	9.______
10. Is chain feeding considered a time-saving procedure?	Yes No	10.______
11. Is there a standard procedure for folding letters for regular business envelopes?	Yes No	11.______
12. Should horizontal lines be printed on forms that are to be filled in on the typewriter?	Yes No	12.______
13. May an unimportant letter be sent as second-class mail?	Yes No	13.______
14. Are personal titles used in legal documents?	Yes No	14.______
15. Is it necessary to have an affidavit sworn to before a legal official?	Yes No	15.______
16. Should a secretary take time to date a telephone message?	Yes No	16.______
17. Is a fiscal period generally less than one month?	Yes No	17.______
18. Is data processing a new procedure in the office?	Yes No	18.______
19. Is a *verifier* a machine that transfers data into a card by punched codes?	Yes No	19.______
20. Is parcel post considered third-class mail?	Yes No	20.______
21. Is one copy of a purchase order sufficient?	Yes No	21.______
22. Is summarizing one limitation of electronic data processing?	Yes No	22.______
23. Is the ten-key listing machine used for complicated multiplication and division problems?	Yes No	23.______
24. Is *billing* ever done on a cycle basis?	Yes No	24.______
25. Can data be stored in a computer?	Yes No	25.______

Score______

SECTION C

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the item selected.

	Answers	For Scoring
1. When Bill's employer told him to send a blind copy of a letter to Mr. Mahler, Bill should have: (A) made an extra carbon copy and typed on the extra and the office file copy the notation, bcc: Mr. Mahler, (B) made a special copy of the letter omitting the inside address, (C) made an extra carbon copy and typed on all copies, bcc: Mr. Mahler, (D) made an extra carbon copy but removed it before he typed the closing lines	______	1.______
2. The secretary who takes dictation: (A) writes special instructions down in detail, (B) writes on any paper that is handy since the notes will be discarded after transcribing them, (C) remembers the instructions about the letters, (D) discourages the employer from changing the message already dictated	______	2.______
3. A secretary who writes approximately 4 outlines to each line and has a letter of 35 shorthand lines should arrange placement for a letter of: (A) under 100 words, (B) approximately 120 words, (C) approximately 150 words, (D) over 200 words	______	3.______
4. The secretary who returns to the desk to begin transcription will: (A) transcribe the letters in the order dictated, (B) transcribe the last letter first, (C) read over notes and make corrections, (D) put the transcription aside and plan to do it later	______	4.______
5. A secretary who is transcribing a letter should remember the following rule about paragraphing: (A) every letter should have at least two paragraphs, (B) every letter should be paragraphed for ease of reading, (C) every letter should have one paragraph since there is only one message, (D) every sentence should be a separate paragraph so that each can be read easily	______	5.______
6. If an executive is interrupted by a telephone call when giving dictation, the secretary should: (A) try to determine what the executive wanted to say next in the dictation, (B) read over notes making changes where needed to improve outlines, (C) leave the office and find something else to do, (D) neither A, B, nor C	______	6.______
7. The indicator slip on a transcribing machine is useful: (A) in determining placement of the items dictated, (B) in learning of corrections and special instructions, (C) in determining how much dictation there is, (D) A, B, and C	______	7.______
8. Proofreading of a transcript should be done by the: (A) executive as he or she reads the letters and signs them, (B) secretary before each letter is removed from the typewriter, (C) secretary after each letter is removed from the typewriter, (D) secretary after the executive has signed the letters	______	8.______

SECTION C (Continued)

Answers For Scoring

9. A secretary preparing a report should: (A) make an original only, (B) destroy the old draft as soon as a new one has been typed, (C) make each draft complete enough to serve as a final draft, (D) keep all rough drafts .... ______ 9.______

10. The following part is included in the body of a report: (A) appendix, (B) conclusions, (C) bibliography, (D) index .... ______ 10.______

11. A secretary who is unsure about a quote in a report being typed for the employer should: (A) ask the employer to locate the original quote, (B) assume the quote is correct, (C) change the quote to make it fit the report better, (D) check the original source .... ______ 11.______

12. A courteous request for a response is: (A) I want you to respond immediately, please, (B) There is no excuse for your not writing to me immediately, (C) Please, don't you dare put this aside and fail to answer me, (D) I shall look forward to a response as soon as possible .... ______ 12.______

13. A proofreaders' mark in the margin used to indicate that something is to be left as it was originally is: (A) l.a.s., (B) stet, (C) put back (D) cap .... ______ 13.______

14. The heading for the second page of a two-page letter includes the following: (A) the topic of the letter, inside name and address, (B) the name of the recipient, address, the date, (C) the topic of the letter, the page number, the date, (D) the name of the recipient, the page number, the date . ______ 14.______

15. When mixed punctuation is used, the special lines that need punctuation marks are: (A) date, inside address, (B) salutation, complimentary close, (C) attention line, subject line, (D) all of the above .... ______ 15.______

16. A letter of 180 words is considered to be a: (A) very short letter, (B) short letter, (C) medium letter, (D) long letter .... ______ 16.______

17. A secretary who receives a letter addressed to the employer and marked *personal* should: (A) take the letter unopened into the employer's office immediately, (B) open the envelope but not remove the letter, (C) open the envelope and read the letter to determine what the content is, (D) leave the letter unopened and put it with the other correspondence on the employer's desk .... ______ 17.______

18. A secretary who opens the mail for the employer will: (A) stack the letters without reading them, (B) immediately discard all envelopes, (C) get from the files any correspondence related to the incoming mail, (D) A and B .... ______ 18.______

19. Bond paper is most frequently used for business letters because: (A) it takes a typed impression clearly, (B) it is very light and therefore folds easily, (C) it is difficult to erase, (D) it is watermarked .... ______ 19.______

20. A letter addressed to the Colson Manufacturing Company should have the salutation: (A) Dear Sirs, (B) Dear Madam, (C) Ladies and Gentlemen, (D) any of the preceding salutations may be used ______ 20.______

21. The style of letter that is considered a time-saver is the: (A) indented style, (B) inverted style, (C) block style, (D) modified block style .... ______ 21.______

22. The details for a follow-up letter are found: (A) in the carbon copy of the original letter, (B) in a variety of materials that the secretary must locate and read, (C) from the executive who must decide on the content of such a letter, (D) from the tickler file .... ______ 22.______

23. The secretary files carbon copies of the letters transcribed: (A) as soon as the transcriptions are completed, (B) about once a month when there is some free time, (C) after the employer has signed the originals, (D) when the employer asks for a file that should have one of the letters in it. ______ 23.______

24. This is the conversation between a visitor and a receptionist: The visitor: "Is this Mr. Clarks' office?" The receptionist: "No, it isn't. Sorry." The receptionist's response was: (A) helpful, (B) not gracious, (C) efficient, (D) standard practice .... ______ 24.______

25. A balance sheet includes the following information: (A) assets and liabilities, (B) sales and cost of goods sold, (C) net profit or net loss, (D) expenses .... ______ 25.______

Score______

SECTION D

INSTRUCTIONS: You are to determine whether each of these statements indicates *good* behavior or *poor* behavior by the secretary. If you think the behavior is good, underline or circle "Good"; if you think it is poor, underline or circle "Poor."

	Answers	For Scoring
1. The secretary waits for the employer to plan the secretary's schedule for the day	Good Poor	1.____
2. The secretary expects the employer to report all the appointments the employer makes	Good Poor	2.____
3. The secretary records special instructions while taking dictation	Good Poor	3.____
4. In typewriting the employer's name in the heading lines of an interoffice memorandum, the secretary does not include the employer's title before his or her name	Good Poor	4.____
5. The secretary makes a list of new words encountered every day and adds them to his or her vocabulary	Good Poor	5.____
6. The secretary types a rough draft as though it is a final draft so that, if there are no corrections, it can serve as the final draft	Good Poor	6.____
7. The secretary uses the letter style that he or she liked best as a student in secretarial office procedures	Good Poor	7.____
8. The secretary quickly types rough drafts of all the letters to be transcribed to be sure of the placement of the letters before typing them on letterhead paper	Good Poor	8.____
9. The secretary finds a way to incorporate every postscript into the body of the letter before beginning the transcription	Good Poor	9.____
10. The secretary gives the employer the transcripts with the carbon paper still in place so that corrections can be made easily	Good Poor	10.____
11. The secretary uses any plain paper available for second pages of long letters	Good Poor	11.____
12. The secretary suggests that the executive make his or her own reservations for a business trip	Good Poor	12.____
13. The secretary uses lightweight carbon paper when many carbon copies are needed	Good Poor	13.____
14. The secretary determines margins for a typed report after considering the style of binding to be used	Good Poor	14.____
15. The secretary doesn't waste time checking the spelling of an unfamiliar word but guesses at the spelling instead	Good Poor	15.____
16. The secretary X's out typing errors on a rough draft	Good Poor	16.____
17. The secretary checks to be sure all enclosures mentioned in a letter are enclosed	Good Poor	17.____
18. To be heard clearly over the telephone, the secretary talks in a normal tone of voice	Good Poor	18.____
19. When a caller is aggressive, the secretary becomes aggressive toward the caller in return	Good Poor	19.____
20. On legal documents the secretary types all numbers in figures only	Good Poor	20.____
21. The secretary proofreads financial statements with another person	Good Poor	21.____
22. In proofreading, the secretary reads the number 2,948 as "two thousand nine hundred forty-eight"	Good Poor	22.____
23. The secretary considers the ZIP Code an extra number and doesn't add it to the address on the envelope	Good Poor	23.____
24. The secretary sends all letters SPECIAL DELIVERY to assure speedy delivery	Good Poor	24.____
25. The secretary marks on a package containing glass the word FRAGILE	Good Poor	25.____

Score________

Secretarial Office Procedures
UNIT 9

Name ____________________
Period ____________________
Date Started ______________
Date Completed ______________
Grade ______________

RAPID COMMUNICATIONS SERVICES

Objectives: The student will:

1. be able to explain basic procedures for using office communications systems.
2. become familiar with the use of the telephone.
3. become aware of common techniques and procedures for receiving calls in the business office.

Materials Needed:

1. Typing paper
2. Message forms

Maximum Time Allowed:

10 days
1 day for test

Procedures:

1. Read pages 314-322 (Part 1).
2. Reviewing, page 322.
3. Judgements, page 322-323.
4. Working with Others, page 323.
5. Language Skills, page 323.
6. Secretarial Tasks, pages 324-325.
7. Read pages 326-332 (Part 2).
8. Reviewing, page 332.
9. Judgements, page 333.
10. Working with Others, page 333.
11. Language Skills, pages 333-334.
12. Secretarial Tasks, page 334.
13. Read pages 335-341 (Part 3).
14. Reviewing, page 341.
15. Judgements, page 341.
16. Working with Others, page 342.

17. Language Skills, pages 342-343.
18. Secretarial Tasks, page 343.
19. Read pages 344-354 (Part 4).
20. Reviewing, page 354.
21. Judgements, pages 354-355.
22. Working with Others, page 355.
23. Language Skills, page 355.
24. Secretarial Tasks, page 356.
25. Test 7.

TEST 7

(Based on Unit 9)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)
Oliverio • Pasewark

South-Western Publishing Co.

Student ______________________________

Class ____________________ Section __________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	10	20	10	10	50
Student's Score					

SECTION A

INSTRUCTIONS: Identify each of the definitions given in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column. Item No. 0 is given as an example. No answer is used more than once.

COLUMN I

A. Bellboy
B. Card Dialer
C. Collect Calls
D. Credit Card Calls
E. DDD
F. Mailgram
G. Mobile Telephone
H. PBX
I. Speakerphone
J. Teleprinter
K. TWX
L. WATS

	COLUMN II	Answers	For Scoring
0.	Radio telephone for cars, buses, taxicabs, planes, trains	G	0. ✓
1.	Uses small plastic cards for frequently dialed numbers	______	1. ____
2.	Teletypewriter exchange service which operates out of a central telephone office	______	2. ____
3.	A service that allows a secretary to type a message which is at the same time transmitted to a telegraph office	______	3. ____
4.	A service that allows customers and potential customers to call a company without cost to the customer	______	4. ____
5.	A service that allows for rapid transmission of a letter	______	5. ____
6.	A personal signaling service provided by the Bell System	______	6. ____
7.	A switchboard to aid in handling telephone calls	______	7. ____
8.	Caller's voice comes from a small loudspeaker on the desk	______	8. ____
9.	Convenient way to make long-distance calls when traveling	______	9. ____
10.	Calls for which the station or person called pays the charges	______	10. ____

Score __________

SECTION B

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

		Answers	For Scoring
1.	When answering the phone, should you identify yourself and your firm, office, or department immediately?	Yes No	1. ____
2.	Does a low-pitched voice carry better over the telephone than a high-pitched voice?	Yes No	2. ____
3.	Can a telephone caller determine if the other person is giving full attention to the conversation?	Yes No	3. ____
4.	Should you create the impression that you are very busy by ending every telephone call quickly?	Yes No	4. ____
5.	Should callers who wish to discuss personal matters with you during business hours be politely discouraged?	Yes No	5. ____
6.	Should a secretary answer all questions asked by an anonymous caller?	Yes No	6. ____
7.	Should the person who receives a telephone call place that call again if it is disconnected?	Yes No	7. ____
8.	Is it possible to dial direct if you are making a person-to-person call?	Yes No	8. ____
9.	Is there a courteous way to screen calls?	Yes No	9. ____
10.	Is faster "dialing" the major advantage of the Touch-Tone telephone over the rotary type?	Yes No	10. ____
11.	Are the two most generally used types of out-of-town calls collect and person-to-person?	Yes No	11. ____
12.	Is the United States divided into three standard time zones: Eastern, Central, and Pacific?	Yes No	12. ____
13.	Is the charge for a full-rate domestic telegram based on the number of words in the message above a minimum number?	Yes No	13. ____
14.	Is it possible to send a telegram by calling a telegraph office?	Yes No	14. ____
15.	Can only plain language be used in sending radiograms to and from ships at sea?	Yes No	15. ____
16.	Will the telegraph company register a firm's cable address free of charge?	Yes No	16. ____
17.	Do TWPL messages usually go through a central Western Union office?	Yes No	17. ____
18.	Can more than one call be handled on a key telephone at the same time?	Yes No	18. ____
19.	Do you usually dial "O" for "Operator" before placing a collect call or a credit card call?	Yes No	19. ____
20.	Is the cost of a long-distance call you dial yourself the same as an operator-assisted call?	Yes No	20. ____

Score __________

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SECTION C

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the item selected.

Answers — For Scoring

1. The Yellow Pages of a telephone directory classify businesses alphabetically: (A) by location, (B) by name, (C) by product or service .... ______ 1.____
2. The quickest and least expensive type of toll call is the: (A) station-to-station call, (B) person-to-person call, (C) conference call .... ______ 2.____
3. The secretary for Arlene K. Michaels, of the Omni Business Display Company, should answer a direct outside call with: (A) "Omni Business Display Company," (B) "Omni Business Display Company, Mrs. Michaels' office," (C) "Good morning, Omni Business Display Company." .... ______ 3.____
4. A term adopted to designate telephone calls dialed by telephone subscribers without operator assistance to points outside their local or extended service area is: (A) TWX, (B) DDD, (C) TAS. ______ 4.____
5. A telephone set with buttons instead of a rotary dial is a: (A) Touch-Tone telephone, (B) Call Director, (C) Bellboy .... ______ 5.____
6. If you were working in an office in San Francisco and wanted to call a business firm in Philadelphia that closes at 5 p.m., you should not place your call after: (A) 2 p.m., (B) 3 p.m., (C) 4 p.m. ..... ______ 6.____
7. When you speak into the telephone mouthpiece you should: (A) hold the mouthpiece about an inch from your lips, (B) tuck the mouthpiece under your chin so you can take the message, (C) hold the mouthpiece about two inches below your lips .... ______ 7.____
8. If you wanted to place a station-to-station DDD call to Benson Manufacturing, area code 901, telephone number 631-4257, you would dial: (A) 901-631-4257, (B) 1-631-4557-901, (C) 1-901-631-4257. ______ 8.____
9. In a business office the telephone should be answered: (A) at the end of the first ring, (B) at the end of the third ring, (C) at the end of the fourth ring .... ______ 9.____
10. The post office in Elizabeth, New Jersey, which is in Union County, is listed in the alphabetic telephone directory (the white pages) under the general heading: (A) Elizabeth, City of, (B) Union, County of, (C) United States Government .... ______ 10.____

Score______

SECTION D

INSTRUCTIONS: In the blank space at the end of each line, write the item defined, explained, or described by the statement.

Answers — For Scoring

1. The type of long-distance call you would place if you wanted to talk to a particular person in a large company and you were not sure that person could be reached is called a .... ______ 1.____
2. The charges made for an out-of-town call depend upon four factors: (1) the distance, (2) the type of call, (3) the time of day or night that the call is made, and (4) .... ______ 2.____
3. A machine which operates on the same principle as a telephone except that the typewritten, rather than the spoken, word is transmitted is a .... ______ 3.____
4. The reference most useful if you are seeking local companies that print company stationery is .... ______ 4.____
5. A cable with a minimum charge for a message of 22 words or less that is transmitted during the night and delivered at its destination the following morning is called a .... ______ 5.____
6. A message written in groups of figures or letters that are not dictionary words is written in .... ______ 6.____
7. An executive who wishes to talk to several persons at different locations at the same time asks the operator to place a .... ______ 7.____
8. You need not pick up the receiver when you use the .... ______ 8.____
9. Machine signals from punched cards or tape are converted into tones that are sent over regular telephone lines with a telephone service called .... ______ 9.____
10. To get the rate schedule for long distance calls, the secretary should check the ______ 10.____

Score______

Secretarial Office Procedures
UNIT 10

Name ______________________
Period ______________________
Date Started ____________
Date Completed ____________
Grade ____________

THE SECRETARY AND REPROGRAPHICS

Objectives: The student will be able to:

1. define the term "reprographics".
2. demonstrate the operations of the duplicating machine.
3. demonstrate the operations of the mimeograph machine.
4. demonstrate the operations of the offset press.
5. conserve on the cost of duplicating supplies.
6. type, write, and make proper corrections on a ditto for preparation of a mailable copy.
7. type, write, and make proper corrections on a stencil for preparation of a mailable copy.
8. type, write, and make proper corrections on an offset master for preparation of a mailable copy.
9. clean the offset press.
10. state at least three safety hazards in operating reprographic equipment.

Materials Needed:

1. Ditto - master, single-edged razor blade
2. Stencil - stencil, correction fluid for stencil, paper clip, cushion sheet
3. Offset Master - master, offset ribbon, offset pen, offset pencil, offset eraser

Maximum Time Allowed:

8 days
1 day to take the test

Procedures:

1. Read pages 358-362.
2. Read "Working with Others" on page 363. Type your answer on a ditto and * run one good copy. Please type your name on the face of the ditto before running. Attach evaluation sheets behind your mailable copy.

* If you do not feel proficient at operating the duplicating machine, you must have another person with you during the operating time. If you find that you need extra help in understanding any of the reprographic machines in the business education center, please have the instructor help you before or after school.

3. Type a mailable copy of Problem 1 on page 364, "Performing Secretarial Tasks". Make a photo copy of the completed task - use one of the copy machines in the school.

4. Submit complete tasks from Part One to the instructor for grading.

5. Read pages 365-379.

6. Type your answer to Making Judgements found on page 380.

7. Read Performing Secretarial Tasks on page 381. Type the task on a stencil and **run one good copy. Type in memo form and don't forget your initials. DO NOT save the stencil. Attach evaluation sheets to copy.

** If you do not feel proficient at operating the mimeograph machine, you must have another person with you during the operating time.

8. Preparation of an offset master:

   Design your own "professional" letterhead. Original design must be initialed by instructor before transcribing the design to the offset master. Save your original in a black and white copy - this copy will be stored in your file. *** Run copies of the letterhead on your own paper and use paper for assignments requiring letterhead. One copy is needed for grading.

***The offset press must be cleaned at least once a week. This will be a group and/or class project. Do not wear good clothes the day YOU will be cleaning the press.

9. Submit completed tasks from Part Two to the instructor for grading.

10. Study the information learned in this chapter and while running the reprographic machines.

11. Take Test No. 8 during one class period.

Name ____________________

Task No. ________ Page ________

Date ____________

DUPLICATING EVALUATION

Did you proofread this job while it was still in the typewriter?

Yes ___ No ___

	Good	Fair	Poor
Planning			
Placement			
Clean type			
Stroking			
Corrections			
Quality of dupli.			

How can this job be improved?

Name ____________________

Task No. ________ Page ________

Date ____________

DUPLICATING EVALUATION

Did you proofread this job while it was still in the typewriter?

Yes ___ No ___

	Good	Fair	Poor
Planning			
Placement			
Clean type			
Stroking			
Corrections			
Quality of dupli.			

How can this job be improved?

Name ____________________

Task No. ________ Page ________

Date ____________

DUPLICATING EVALUATION

Did you proofread this job while it was still in the typewriter?

Yes ___ No ___

	Good	Fair	Poor
Planning			
Placement			
Clean type			
Stroking			
Corrections			
Quality of dupli.			

How can this job be improved?

Name ____________________

Task No. ________ Page ________

Date ____________

DUPLICATING EVALUATION

Did you proofread this job while it was still in the typewriter?

Yes ___ No ___

	Good	Fair	Poor
Planning			
Placement			
Clean type			
Stroking			
Corrections			
Quality of dupli.			

How can this job be improved?

PERFORMANCE EVALUATION

Machine ______________________________

Name ______________________________

Course ______________________________

Date ______________ Grade ______

PREPARATION

__________ Feed table properly adjusted
__________ Receiving tray properly adjusted
__________ Proper paper selected
__________ Paper riffled
__________ Paper properly positioned
__________ Paper counter set
__________ Fluid supply checked
__________ ______________________________
__________ ______________________________
__________ ______________________________

MACHINE ADJUSTMENTS

__________ Master properly attached
__________ Vertical adjustment
__________ Horizontal adjustment
__________ Impression adjustment
__________ Fluid supply adjustment
__________ Set off corrected
__________ ______________________________
__________ ______________________________
__________ ______________________________

JOB COMPLETION

__________ Motor turned off
__________ Master properly discarded
__________ Cylinder in inactive position
__________ Fluid control inactive
__________ Pressure control inactive
__________ Machine cleaned
__________ Cylinder properly covered
__________ Work area cleaned
__________ Supplies conserved
__________ ______________________________
__________ ______________________________
__________ ______________________________

TEST 8

(Based on Unit 10)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

Oliverio • Pasewark

South-Western Publishing Co.

Student ____________________

Class ____________________ Section __________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	30	10	10	50
Student's Score				

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Will some models or copiers enlarge or reduce the material during the copying process?	Yes No	1. ____
2. Are copiers hard to operate?	Yes No	2. ____
3. Are copies made by the fluid duplicating process as attractive as those made using other duplicating processes?	Yes No	3. ____
4. Can a copier be used to answer a letter by making handwritten notations on the original letter and then copying it before the original is sent back to the sender?	Yes No	4. ____
5. Can handwriting and artwork be reproduced when using a fluid duplicator?	Yes No	5. ____
6. Is the large drum of rubber on an offset duplicator called a blanket?	Yes No	6. ____
7. Should you leave at least one-half inch of blank space at the top and bottom of a fluid master?	Yes No	7. ____
8. Does the offset process operate on the principle that "grease and water will not mix"?	Yes No	8. ____
9. Is one of the features of copiers not having to prepare a master or stencil from the original?	Yes No	9. ____
10. Are copies made by the stencil process of better quality than copies made by the offset process?	Yes No	10. ____
11. Can fluid carbon paper be used only once?	Yes No	11. ____
12. Should you type a guide copy before you type the stencil?	Yes No	12. ____
13. For most duplicating processes, is it necessary to clean the typewriter type before you type a master?	Yes No	13. ____
14. When typing a stencil, should you strike with more force letters and punctuation marks which have a small sharp printing surface such as *c* and the *period*?	Yes No	14. ____
15. When correcting an error on a fluid master, do you first scrape off the unwanted carbon?	Yes No	15. ____
16. Should you wait until you have finished the entire stencil before making any corrections?	Yes No	16. ____
17. If your employer wanted 5,000 copies of a program duplicated for an important meeting, would you duplicate the program on a fluid duplicator?	Yes No	17. ____
18. Should you proofread and make corrections on a master before removing it from the typewriter?	Yes No	18. ____
19. Does a soft, nongreasy eraser have to be used when correcting an offset master?	Yes No	19. ____
20. Do some models of copiers produce fluid masters and offset mats?	Yes No	20. ____
21. When typing a stencil, will the use of a sheet of cellophane film help to produce sharper copy?	Yes No	21. ____
22. Is a cushion sheet useful when typing a fluid master?	Yes No	22. ____
23. Can more than one color be reproduced when using the fluid duplicating process?	Yes No	23. ____
24. Would a copier be the fastest way to make ten copies of a business paper?	Yes No	24. ____
25. Are offset duplicating machines in large offices normally operated by secretaries?	Yes No	25. ____
26. Does pressure on the face of the fluid master created by a typewriter key or writing instrument deposit a carbon image on the back of the master sheet?	Yes No	26. ____
27. Can an infrared copier reproduce copies if the material to be copied does not contain carbon?	Yes No	27. ____
28. Does a stencil made on an electronic stencil maker have to be proofread?	Yes No	28. ____
29. Should you leave the paper bail rollers inside the boundary markings of the offset master?	Yes No	29. ____
30. Does an electric typewriter automatically give you an even touch for cutting a stencil?	Yes No	30. ____

Score ________

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SECTION B

INSTRUCTIONS: Identify each item below in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column.

COLUMN I	COLUMN II	Answers	For Scoring
A. Copying machine	1. The process of pushing aside the wax coating on the fibrous stencil sheet with a typewriter key	______	1.____
B. Reprographics	2. The sample that shows what the final duplicated copy should look like	______	2.____
C. Offset duplication	3. The machine used when an exact duplication of a business form is needed	______	3.____
D. Fluid duplication	4. Assembling the pages of a duplicating job in the proper order and fastening the pages into sets	______	4.____
E. Electronic stencil or master maker	5. The term that encompasses all duplicating and copying processes	______	5.____
F. Stencilization	6. The duplication process used when up to 10,000 copies are needed and quality need not be the finest	______	6.____
G. Stencil duplication	7. The duplication process used mostly for interoffice communications and which is the least expensive duplicating process for about 10 to 30 copies	______	7.____
H. Collating	8. The duplication process used when large quantities of excellent quality copies are needed	______	8.____
I. Guide copy	9. A chemical substance used in the correction of errors on stencils	______	9.____
J. Correction fluid	10. A machine used to make offset masters, fluid masters, and stencils from a drawing or typed page	______	10.____

Score________

SECTION C

INSTRUCTIONS: In the blank space at the end of each line, write the item defined, explained, or described by the statement.

	Answers	For Scoring
1. When you are preparing a stencil, you should move the ribbon control to what position?	______________	1.____
2. The duplicating process which makes copies so that the printing looks like the type on a page in a book is	______________	2.____
3. When correcting an error on a stencil, to replace the stencil coating you use a small amount of	______________	3.____
4. To aid you in positioning properly the material on a stencil, __________ are provided on the stencil	______________	4.____
5. When the material to be typed on a stencil is first placed on ordinary typing paper, this copy is called the	______________	5.____
6. When you need 200 copies but the quality of the copies is not important, you should probably use a/an	______________	6.____
7. The machine to use when a complicated drawing must be reproduced exactly is a	______________	7.____
8. A machine that electronically reproduces a master or a stencil from an original copy is called a/an	______________	8.____
9. Two popular types of copiers are infrared and	______________	9.____
10. The process of gathering or assembling a duplicated job of two or more pages is called	______________	10.____

Score________

Secretarial Office Procedures
UNIT 11

Name ____________________
Period ____________________
Date Started ____________________
Date Completed ____________________
Grade ____________________

FILING RECORDS

Objectives: The student will be:

1. aware of the importance of systematic records control for the "memory" of a business.
2. aware that if business should lose their records through some disaster they may be forced to go out of business.
3. able to use the rules for alphabetic indexing of personal names.
4. able to use the rules for alphabetic filing of business firms and other organizations.
5. aware of the different filing equipment and supplies.
6. aware of the standard rules for filing may change to improve the system.

Materials Needed:

1. 3" X 5" blank filing cards (200)
2. 7½" X 10½" manila envelopes
3. "Filing Procedures" film strip and summary sheet

Maximum Time Allowed:

10 days

Procedures:

1. View the film strip and complete the summary sheet on the film.
2. Read pages 384-389.
3. Type your answers to: Refreshing Language Skills - page 390.
   Performing Secretarial Tasks - page 391.
4. Read pages 392-398.
5. Type your answers to: Reviewing - page 399.
   Performing Secretarial Tasks - pages 400-402.
   (put a rubber band around completed cards)
6. Read pages 403-416.
7. Type your answers to: Reviewing - pages 416-417 and Performing Secretarial Tasks - page 418 - Problems 1, 2, 3, 4 (group 1-7), and 5. Problems 1-4 may be typed on the same paper.
8. Read pages 425-434.
9. Type your answers to Improving Secretarial Skills - page 436.
10. Obtain a manila envelope from the instructor and then submit the completed assignments to the instructor. Be sure to write your name, date and class period on the outside of the envelope and have all assignments in the envelope.

Secretarial Office Procedures
REVIEW SHEET

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

FILING PROCEDURES

Directions: Watch the film strip on the above topic. Take notes on the following items. Take your notes on a separate piece of paper and then transcribe your notes on this paper at the typewriter. Be sure to correct all your errors.

IF FILES ARE TO BE HELPFUL TO A BUSINESS, THEY MUST HAVE THE FOLLOWING FOUR ITEMS FOUND IN THE SYSTEM:

WHO WOULD DO THE FILING IN DIFFERENT SIZE COMPANIES?

WHAT FUNCTIONS MUST THE PEOPLE IN CHARGE OF FILING COMPLETE?

WHAT IS REQUIRED TO PREPARE MATERIALS FOR FILING?

CODING FOR LETTERS: HOW AND WHERE -

ORIGINAL -

CARBON COPY -

SUBJECT FILING -

NUMERIC FILING -

GEOGRAPHIC -

THREE THINGS YOU MUST KNOW TO PROPERLY SORT AND ARRANGE A FILE:

WHERE SHOULD YOU TYPE ON A GUMMED LABEL?

REVIEW SHEET - Filing Procedures

PREPARE AN INDIVIDUAL FOLDER FOR CORRESPONDENCE WITH AT LEAST __________ NUMBER OF ITEMS FOR FILING.

HOW SHOULD YOU FILE WITHIN A FOLDER?

WHAT ARE "GUIDES" ON A FILE?

WHO SHOULD REMOVE ARTICLES FROM THE FILES?

EXPLAIN A FILE REQUEST FORM.

EXPLAIN A FILE INDEX FORM.

WHAT IS AN OUT FILE FOLDER?

WHY IS A CROSS REFERENCE SHEET USED IN FILING?

RECORDS ARE USED WITHIN _______________ WEEKS AFTER RECEIVING THE ITEM.

RECORDS SHOULD BE MOVED AT THE END OF __________ YEAR(S) TO TRANSFER FILES.

EXPLAIN A TRANSFER FILE.

HOW AND WHEN SHOULD A BUSINESS DISPOSE OF RECORDS?

Secretarial Office Procedures

Name ______________________
Period ______________________
Date Started ______________
Date Completed ______________
Grade ______________

STANDARD PAYROLL PROJECT

Objectives: The student will be able to:

1. compute time worked by each employee.
2. compute wages that are paid according to piece work.
3. compute wages that are paid on an hourly basis.
4. compute gross wages per employee.
5. calculate the deductions for each employee.
6. calculate the net pay for each employee.
7. record the payroll information on the payroll register.
8. compute a payroll currency analysis for payroll period.
9. type the employee's payroll information on the earnings record when a new employee is hired.
10. type payroll computations on the employee's permanent earnings record.
11. record the payroll information on the stub of the paycheck.
12. type the needed information on a payroll check and prepare the checks for the employer's signature.

Materials Needed:

Standard Payroll Project Practice Set

Maximum Time Allowed:

The students will work on this project congruently with other Secretarial Office Procedures units. This project is to be completed at least one week before the end of the grading term.

Procedures:

1. Write your name on the front of the project envelope.
2. Read the information sheets. Feel free to write on those pages.
3. Complete the assignments required in the practice set in the following manner:

Time Card - pen
Payroll Register - pencil
Payroll Currency Analysis - pencil
Payroll Change Memo - pen
Employee's Earnings Record - type heading, pen on rest of card
Payroll Check Stub - pen
Payroll Check - typewriter

4. The following will be submitted for grading at the end of each pay period: Time cards, Payroll Register, Employee's Earnings Record, and Payroll Currency Analysis and Payroll Change Memo or Checks.
5. Only the Employee's Earnings Record will be returned to you for further use in the project.
6. The instuctor will inform you if you have any errors on the other records.

Grading:

Your completed forms will be graded on:

a. Accuracy of calculations
b. Correct tool used when recording information on a form
c. Neatness of form
d. Efficient use of time when completing project

Secretarial Office Procedures
UNIT 12

Name ______________________
Period ____________________
Date Started ____________
Date Completed ____________
Grade ____________

THE SECRETARY AND RECORDS MANAGEMENT

Objectives: The student will be able to:

1. discuss the meaning of records management.
2. discuss steps in proper filing procedures.
3. sort correspondence for filing.
4. index by subject, numeric and geographic filing systems.

Materials Needed:

3" X 5" file cards (100)
Folder labels

Maximum Time Allowed:

10 days
1 day for test

Procedures:

1. Read pages 438-447 (Part 1).
2. Reviewing, page 447.
3. Judgements, page 447.
4. Working with Others, page 447.
5. Language Skills, page 448.
6. Secretarial Tasks, pages 449-451.
7. Read pages 452-458 (Part 2).
8. Reviewing, pages 458-459.
9. Judgements, page 459.
10. Working with Others, page 459.
11. Secretarial Tasks, pages 459-460.
12. Read pages 461-474 (Part 3).
13. Reviewing, page 475.
14. Judgements, page 475.
15. Working with Others, page 475.
16. Language Skills, pages 475-476.
17. Secretarial Tasks, page 476.

UNIT 12

Page 2

18. Read pages 477-488 (Part 4).
19. Reviewing, page 488.
20. Judgements, page 488.
21. Working with Others, page 489.
22. Language Skills, page 489.
23. Secretarial Tasks, pages 489-490.
24. Test 9

TEST 9

(Based on Units 11 and 12)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)
Oliverio • Pasewark

South-Western Publishing Co.

Student ______________________________

Class ____________________ Section __________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	15	10	10	15	50
Student's Score					

SECTION A

INSTRUCTIONS: Identify each item given below in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column.

COLUMN I

A. Alpha-numeric plan
B. Card tickler file
C. Cross reference
D. Elevator file
E. Geographic file
F. Hard copy
G. Individual folder
H. Micrographics
I. Numeric file
J. Out guide
K. Primary guide
L. Random files
M. Release mark
N. Requisition card
O. Rotary file
P. Shelf file
Q. Signals
R. Subject file

COLUMN II	Answers	For Scoring
1. Filing system having major sections of the country as primary guides	________	1. ____
2. Process whereby exact copies of valuable records can be reproduced in miniature	________	2. ____
3. Filing system in which cards are equipped with strips of metal teeth which are attached to the bottom edge of the card	________	3. ____
4. Filing system designed around the concerns of a business	________	4. ____
5. A follow-up file consisting of 12 monthly primary guides and 31 secondary guides	________	5. ____
6. Notation inside a folder that a paper is filed elsewhere	________	6. ____
7. Term referring to a photocopy of microfilmed material	________	7. ____
8. Little pieces of metal or other material, usually colored, that are placed in visible files to indicate certain classifications	________	8. ____
9. Folder prepared when six pieces of filed material to, for, or about one person or subject have accumulated in the miscellaneous folder	________	9. ____
10. Form filled out by a person who borrows materials from a file	________	10. ____
11. Filing system especially appropriate for filing stock and inventory records, requisitions, purchase orders, sales orders, vouchers, contracts, projects, jobs, cases, licenses, customers' charge accounts, credit card accounts	________	11. ____
12. Power-driven filing equipment with trays arranged on shelves that can be brought to the working level of the operator	________	12. ____
13. Sheet of pressboard used when an entire folder is removed	________	13. ____
14. Notation which is the file clerk's authority to file a business document	________	14. ____
15. Sheet of pressboard used to indicate major divisions of a filing system	________	15. ____

Score __________

SECTION B

INSTRUCTIONS: For each of the following names, select the *second* indexing unit. Write that unit in the Answers column at the right of the name. Item No. 0 is given as an example.

	Answers	For Scoring
0. Ye Olde Antique Shoppe	Olde	0. √
1. Beverly's Beauty Salon		1. ____
2. Anderson-Young Electronics		2. ____
3. Haskins County Farm Bureau		3. ____
4. First National Park, Phoenix		4. ____
5. Deckelman's Locksmiths		5. ____
6. S and L Sewing Center		6. ____
7. La Fonda Restaurant		7. ____
8. E-Z-Find Thrift Shop		8. ____
9. Mrs. Michael (Beth) Hime		9. ____
10. Hotel Marquis		10. ____

Score __________

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SECTION C

INSTRUCTIONS: Indicate the correct indexing order of the three names by writing the letters a, b, and c in parentheses before the names. Write in the Answers column the *letter* that you placed before the last name. Item No. 0 is given as an example.

	Answers	For Scoring
0. (a) J. H. Sharon (c) John W. Steger (b) Chester C. Staats	b	0. √
1. ( ) Howard M. Kelley ( ) Horace J. Kelly ( ) Howard B. Kelsay		1.
2. ( ) Alton Candy Counter ( ) A-1 Kindergarten ( ) James Conrad Alton		2.
3. ( ) Ervin C. Roberts ( ) Mrs. Elton (Karen) Roberts ( ) Brenda (Mrs. W.P.) Roberts		3.
4. ( ) Kirby-Haynes Realtors ( ) Rita N. Kirbey, M.D. ( ) Kirbey Litho & Printing		4.
5. ( ) Hancock Fabric Store ( ) Lee J. Hancock ( ) Preston R. Hance		5.
6. ( ) Cross Roads Beauty Bar ( ) Cross Bar Health Retreat ( ) Hotel Crossroads		6.
7. ( ) Lonnie J. MacCasland, ( ) Travis G. McCaslin ( ) Timothy M. McCasland		7.
8. ( ) REA Business College ( ) Read-A-Lot Book Store ( ) Harold O'Reade		8.
9. ( ) Young's Department Store, Atlanta, Georgia ( ) Young's Department Store, Savannah, Georgia ( ) Young's Department Store, Athens, Georgia		9.
10. ( ) Keat's Fabric Center ( ) J. P. Keating's Draperies ( ) Keats' Iron & Metal Works		10.

Score

SECTION D

INSTRUCTIONS: The answers to each of the questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Are photocopies sometimes made as an alternative to cross-referencing?	Yes No	1.
2. In individual folders, letters are arranged according to date, with the most recent letter in back	Yes No	2.
3. If a particular document is difficult to retrieve, it should be cross-referenced when it is finally found	Yes No	3.
4. A miscellaneous folder is kept for every alphabetic primary guide	Yes No	4.
5. The process of determining how a document is to be filed is called coding	Yes No	5.
6. All records considered essential to the operation and growth of an organization are classified as useful records	Yes No	6.
7. Is the only part of a man's name that a woman may legally assume upon marriage his last name?	Yes No	7.
8. Are numbers read from right to left in a terminal-digit file?	Yes No	8.
9. Is formulation of a records retention schedule a primary responsibility of the secretary?	Yes No	9.
10. Is microfilming appropriate for most company correspondence?	Yes No	10.
11. Are supplementary card files essential to quick retrieval in numeric, geographic, and subject files?	Yes No	11.
12. In a "special" folder in an alphabetic file, are the records arranged alphabetically by name and then by date within the group of names?	Yes No	12.
13. Are carrier folders ordinarily easy to identify?	Yes No	13.
14. A file drawer should be filled to its capacity	Yes No	14.
15. Is one month an appropriate charge-out period?	Yes No	15.

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Score

Secretarial Office Procedures
UNIT 13

Name ______________ 233
Period ______________
Date Started ______________
Date Completed ______________
Grade ______________

THE SECRETARY AND TRAVEL RESPONSIBILITIES

Objectives: The student will:

1. have an understanding of the standard procedures for making travel plans.
2. be aware of local travel sources and hotel information.
3. be able to prepare an itinerary and understand its importance.

Materials Needed:

Typing paper

Maximum Time Allowed:

6 days
1 day for test

Procedures:

1. Read pages 492-504 (Part 1).
2. Reviewing, page 504.
3. Judgements, page 505.
4. Working with Others, page 505.
5. Language Skills, pages 505-506.
6. Secretarial Tasks, pages 506-507.
7. Read pages 508-519 (Part 2).
8. Reviewing, page 519.
9. Judgements, page 520.
10. Working with Others, page 520.
11. Language Skills, pages 520-521.
12. Secretarial Tasks, pages 521-522.
13. Have instructor dictate the letter to Mr. T. W. Linett, President, Oakdale Construction Corp.
14. Test 10.

TEST 10

(Based on Unit 13)

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(Ninth Edition)
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Student ____________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	20	15	15	50
Student's Score				

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

		Answers	For Scoring
1.	Is the secretary generally responsible for determining the types of travel service that are best for the executive?	Yes No	1. ____
2.	Do some companies have a central office that takes care of all travel plans for executives throughout the firm?	Yes No	2. ____
3.	Is it possible to determine from an airline's schedule if a particular flight includes a meal?	Yes No	3. ____
4.	Is it possible for a secretary to make an airline reservation by telephone?	Yes No	4. ____
5.	Is it necessary to call an airline a day after placing a request for a reservation to confirm that reservation?	Yes No	5. ____
6.	Are airports generally within a few miles of the centers of cities?	Yes No	6. ____
7.	Are the times indicated in an airlines schedule the local times?	Yes No	7. ____
8.	Are inoculations required for all travelers to Western European countries?	Yes No	8. ____
9.	Does a hotel generally have one price for all its rooms?	Yes No	9. ____
10.	Does the secretary include hotel confirmations in the executive's travel folder?	Yes No	10. ____
11.	Does a travel agency making arrangements for an executive charge the executive for services rendered?	Yes No	11. ____
12.	Is a major disadvantage of air travel the element of uncertainty due to unfavorable weather conditions?	Yes No	12. ____
13.	Does the *Official Airline Guide* give complete information on all flights between cities in the United States?	Yes No	13. ____
14.	Do airlines ever mail tickets to the prospective traveler?	Yes No	14. ____
15.	Is a visa obtained from the Department of State?	Yes No	15. ____
16.	Should advanced reservations be made when your employer wants a rental car?	Yes No	16. ____
17.	It is necessary to present a valid driver's license when renting a car?	Yes No	17. ____
18.	Are passports required for travelers flying from the United States to Canada?	Yes No	18. ____
19.	Is the prospective traveler guaranteed a seat on the next scheduled shuttle flight when he or she fills out a boarding pass?	Yes No	19. ____
20.	Can reservations at most large hotel and motel chains be made without charge by calling a nationally listed number?	Yes No	20. ____

Score ________

SECTION B

INSTRUCTIONS: In each of the following sentences, select the term or phrase that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the phrase.

		Answers	For Scoring
1.	Ordinarily, domestic air travelers should check in at the appropriate airline office: (A) not less than one hour before departure, (B) not less than 30 minutes before departure, (C) not less than 5 minutes before departure	________	1. ____
2.	Of the three popular modes of travel, the least expensive is: (A) air coach, (B) bus, (C) day coach train	________	2. ____
3.	On extended trips for which a considerable amount of money is needed, an executive may consider it advisable to carry: (A) a bank draft, (B) an American Express credit card, (C) a letter of credit	________	3. ____
4.	Many large companies have a department to take care of travel arrangements for their employees. It is called the: (A) Shipping Department, (B) Personnel Department, (C) Transportation Department	________	4. ____

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SECTION B (Continued)

Answers | For Scoring

5. For flight information when planning a long trip, it is best to consult the: (A) *Mobil Travel Guide*, (B) *Official Airline Guide*, (C) *World Guide* ______ 5.______
6. The Metroliner which travels between New York and Washington is a/an: (A) Eastern Airlines shuttle, (B) Greyhound express bus, (C) high speed train ______ 6.______
7. When your employer tells you that he or she must make a trip, you should immediately set up: (A) an expense report, (B) a trip folder, (C) a travel guide ______ 7.______
8. Most hotels, motels, and airlines will accept a personal check if the traveler can produce for identification a: (A) Social Security card, (B) driver's license, (C) credit card ______ 8.______
9. Travelers checks are *not* sold at: (A) banks, (B) travel agencies, (C) post offices ______ 9.______
10. When airline tickets are mailed to your employer, the airline expects a check in payment: (A) within 72 hours, (B) at the end of the month, (C) within 30 days ______ 10.______
11. If, at the last minute, your employer cannot leave on a business trip, you should cancel the reservation: (A) within 24 hours, (B) immediately, (C) within 30 minutes of the scheduled flight departure ______ 11.______
12. To prepare complete and accurate records of the deductible expenses incurred on business trips, the federal income tax regulations suggest that your employer: (A) submit a report of expenses at the end of each trip, (B) submit a yearly estimate of all expenses, (C) keep a daily record of expenses on each trip ______ 12.______
13. The flight that provides both first class and economy service is: (A) 585 F/E, (B) 130 F/Y, (C) 292 F/S. ______ 13.______
14. A flight that leaves New York City at 12 noon (EST) and takes 6 hours to reach San Francisco will arrive in San Francisco at: (A) 3 p.m. (PST), (B) 4 p.m. (PST), (C) 5 p.m. (PST) ______ 14.______
15. When your employer is traveling, your first duty will be to take care of: (A) upcoming travel arrangements, (B) daily mail, (C) unscheduled appointments ______ 15.______

Score______

SECTION C

INSTRUCTIONS: In the blank space at the end of each line, write the item defined, explained, or described by the statement.

Answers | For Scoring

1. The letter a hotel writes to an executive indicating that a room has been reserved is called ____________________ 1.______
2. The hotel plan which quotes the price of the room only is known as ____________________ 2.______
3. The most frequently consulted hotel and motel directory which lists the members of the American Hotel and Motel Association is known as ____________________ 3.______
4. Passport applications may be obtained from the clerk of your Federal District Court or from any one of the eight passport agencies of ____________________ 4.______
5. An endorsement on a passport by a representative of the country granting permission to enter the country for a certain purpose and length of time is called ____________________ 5.______
6. A business executive taking an extensive trip probably will not wish to carry enough cash to pay all travel expenses. One way to obtain cash quickly on a trip is to cash a ____________________ 6.______
7. A location at an airport where a traveler may leave a car for an extended period of time is ____________________ 7.______
8. All major airlines keep track of how many seats are available for each flight by the use of ____________________ 8.______
9. A type of airline service that requires no prior reservation is ____________________ 9.______
10. It is possible to purchase foreign currency at ____________________ 10.______
11. The fastest way to get flight information is to call ____________________ 11.______
12. A fixed daily amount allotted to an employee traveling on company business which, if exceeded, will not be reimbursed is known as ____________________ 12.______
13. To make plane connections at nearby airports, travelers frequently use a type of transportation service that is faster and more expensive than cabs, buses, and limousines. It is known as ____________________ 13.______
14. The form that lists all business expenses for a trip is called a/an ____________________ 14.______
15. When a hotel's basic rate includes meals as well as a room, the hotel is said to operate on ____________________ 15.______

Score______

250

Secretarial Office Procedures
UNIT 14

Name ______________
Period ______________
Date Started ______________
Date Completed ______________
Grade ______________

THE SECRETARY AND FINANCIAL RECORDS

Objectives: The student will:

1. have an understanding of financial recordkeeping.
2. understand banking services for personal purposes.
3. understand a monthly financial statement and be able to discuss it.
4. understand the procedures for maintaining records for tax purposes.
5. have an understanding of tax rules and regulations.
6. have an understanding of underlying purposes and general procedures for maintaining financial data.

Materials Needed:

1. Typing paper
2. Workbook forms

Maximum Time Allowed:

15 days
1 day for test

Procedures:

1. Read pages 524-534 (Part 1).
2. Reviewing, page 534.
3. Judgements, page 534.
4. Working with Others, page 535.
5. Language Skills, page 535.
6. Secretarial Tasks, pages 536-537.
7. Read pages 538-542 (Part 2).
8. Reviewing, page 542.
9. Judgements, page 543.
10. Working with Others, page 543.
11. Language Skills, pages 543-544.
12. Secretarial Tasks, page 544.
13. Read pages 545-549 (Part 3).
14. Reviewing, page 550.
15. Judgements, page 550.

16. Working with Others, pages 550-551.
17. Language Skills, page 551.
18. Secretarial Tasks, pages 551-552.
19. Read pages 553-560 (Part 4).
20. Reviewing, pages 560-561.
21. Judgement, page 561.
22. Working with Others, page 561.
23. Language Skills, page 562.
24. Secretarial Skills, pages 562-563.
25. Test 11.

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TEST 11

(Based on Unit 14)

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Student ______________________________

Class ____________________ Section__________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	10	10	20	10	50
Student's Score					

SECTION A

INSTRUCTIONS: In the blank space at the end of each line, write the item defined, explained, or described by the statement.

Answers — For Scoring

1. Special fund set aside for paying small expenses is called the .... ______________ 1.____
2. A form supplied by the bank, on which you list currency, silver, checks, or money orders to be deposited in the bank is called a .... ______________ 2.____
3. When a depositor writes a check on an account in which there are not sufficient funds to cover the full payment, the account is said to be .... ______________ 3.____
4. A check that has an attachment with details of the purpose of the check is a ______________ 4.____
5. The person to whom a check is made out is known as the .... ______________ 5.____
6. A detailed estimate of expected expenses is.............................. ______________ 6.____
7. Immediately before writing a check one should fill out .... ______________ 7.____
8. The notation written across the back at the top of the left end of a check is called .... ______________ 8.____
9. In reconciling a bank statement, the total of the outstanding checks should be deducted from .... ______________ 9.____
10. One of the major advantages of paying by check is that the canceled check will ultimately be returned to the one who wrote it and thereby serve as a .. ______________ 10.____

Score__________

SECTION B

INSTRUCTIONS: Identify each item given below in Column II by selecting one of the terms given in Column I and writing its *letter* in the Answers column.

COLUMN I

A. Postal money order
B. Drawee
C. Bank statement
D. Restrictive indorsement
E. Certified check
F. Bank draft
G. Voucher check
H. Cashier's check
I. Special indorsement
J. Blank indorsement
K. Reconciling the bank statement
L. Drawer

COLUMN II — Answers — For Scoring

1. The name of the person signing a check .... __________ 1.____
2. An indorsement which shows the name of the person to whose order the check is being transferred and the indorser's signature .... __________ 2.____
3. An indorsement which includes only the indorser's signature ...... __________ 3.____
4. An indorsement which shows the indorser's signature and the purpose for which the check is being transferred.......................... __________ 4.____
5. A check by which the payee is guaranteed payment by the bank in which the drawer has his account .... __________ 5.____
6. A check which indicates on its face or on a detachable stub the specific invoice, bill, or service for which payment is made .... __________ 6.____
7. An order drawn by one bank on its deposits in another bank to pay a third party.. __________ 7.____
8. A check that a bank draws on its own funds...................... __________ 8.____
9. The process of accounting for any difference there may be between the final balance on the bank statement and the checkbook balance .... __________ 9____
10. A document mailed by the bank monthly to each depositor which lists the additions and deductions made to the account over the past month __________ 10.____

Score__________

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SECTION C

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. Should petty cash receipts be signed by the person receiving the money?	Yes No	1.____
2. Before replenishing the Petty Cash Fund, is it necessary to "prove" the fund by adding the amount of cash on hand to the total of all petty cash receipts?	Yes No	2.____
3. In business, is cash used to pay large expenses?	Yes No	3.____
4. Is it good practice to sign each check in a different way to prevent someone from forging your signature?	Yes No	4.____
5. If you have a large number of checks to be deposited, can you show only the total amount of the checks on the deposit slip?	Yes No	5.____
6. Is it a good idea to write checks with a pencil?	Yes No	6.____
7. Can a check with a restrictive endorsement be sent safely through the mail?	Yes No	7.____
8. Is the blank indorsement the best choice for a check that will be mailed?	Yes No	8.____
9. To save time, should you sign a number of checks ahead of the time you will need them?	Yes No	9.____
10. Is a check with a blank indorsement negotiable?	Yes No	10.____
11. Is the appropriate written amount notation for a $.75 check "Only 75/100 cents"?	Yes No	11.____
12. Should checks marked "Void" be saved?	Yes No	12.____
13. Is it necessary to prepare a regular check stub if a duplicate check is prepared?	Yes No	13.____
14. Is a phone call the only authorization needed by the bank in order to effect stop-payment proceedings?	Yes No	14.____
15. Do banks ever charge for handling overdrafts?	Yes No	15.____
16. In reconciling a bank statement, should the bank's service charge be deducted from the final bank balance shown on the statement?	Yes No	16.____
17. Can a stop-payment order be issued against a certified check?	Yes No	17.____
18. Does a blank endorsement make a check payable to anyone who may possess it?	Yes No	18.____
19. Can a postal money order be cashed at any money order office within 30 days after issue?	Yes No	19.____
20. Can express money orders be cashed at banks?	Yes No	20.____

Score________

SECTION D

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False" in the Answers column.

	Answers	For Scoring
1. Organizations maintain checking accounts in savings banks in order to pay the expenses of their businesses	True False	1.____
2. Secretaries can be authorized to sign checks	True False	2.____
3. It is possible to identify checks when deposits are made by the use of transit numbers	True False	3.____
4. Checks should be dated for the date they will arrive in the office of the recipients	True False	4.____
5. It is not a good idea to indicate the purpose of a check on the face of the check	True False	5.____
6. Since checks are returned to the office from which they originated, keeping a record of each check written is considered unnecessary in most offices	True False	6.____
7. An illegible signature is a certain assurance against forgery	True False	7.____
8. American Express money orders are good indefinitely	True False	8.____
9. Interest earned and rent are taxable income	True False	9.____
10. The secretary responsible for maintaining a budget should be able to determine the state of that budget quickly	True False	10.____

Score________

Secretarial Office Procedures
UNIT 15

Name ____________________
Period ____________________
Date Started ______________
Date Completed ______________
Grade ______________

YOU AND SECRETARIAL WORK

Objectives: The student will:

1. learn various ways of learning about job opportunities.
2. learn how to prepare a resume.
3. prepare a letter of application.
4. have an understanding of interview techniques.

Materials Needed:

1. Typing paper
2. Workbook

Maximum Time Allowed:

17 days
1 day for test

Procedures:

1. Read pages 566-572 (Part 1).
2. Reviewing, page 572.
3. Judgements, page 573.
4. Working with Others, page 573.
5. Language Skills, page 573.
6. Secretarial Tasks, page 574.
7. Read pages 575-584 (Part 2).
8. Reviewing, page 584.
9. Judgements, pages 584-585.
10. Working with Others, page 585.
11. Language Skills, pages 585-586.
12. Secretarial Tasks, page 586.
13. Read pages 587-591 (Part 3).
14. Reviewing, page 592.
15. Judgements, page 592.
16. Working with Others, page 592.
17. Language Skills, pages 592-593.
18. Secretarial Tasks, page 593.

19. Read pages 594-607 (Part 4).
20. Reviewing, page 607.
21. Judgements, page 607.
22. Working with Others, pages 607-608.
23. Language Skills, page 608.
24. Secretarial Tasks, page 608.
25. Read pages 609-615 (Part 5).
26. Reviewing, page 615.
27. Judgements, pages 615-616.
28. Working with Others, page 616.
29. Language Skills, pages 616-617.
30. Secretarial Tasks, page 617.
31. Test 12.

TEST 12

(Based on Unit 15)

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Student ____________________

Class ____________________ Section ________

SCORING RECORD	SCORES BY SECTION			TOTAL
	A	B	C	
Maximum	15	25	10	50
Student's Score				

SECTION A

INSTRUCTIONS: Each of the following practices is either a *good* or a *poor* practice. Indicate your answer by underlining or circling either "Good" or "Poor" in the Answers column.

	Answers	For Scoring
1. Steve heard about a job from a friend and called the company asking: "Could I have a job in your office?"	Good Poor	1.____
2. Frank asked his secretarial procedures teacher if he could list her name as a reference on an application blank	Good Poor	2.____
3. Brian left blank the section of the application form that asked a listing of the business courses he had taken in high school	Good Poor	3.____
4. Alma told the interviewer that she would not consider a job unless she would be working with a top executive	Good Poor	4.____
5. Tom practiced briefly on the typewriter he was to use for a performance test	Good Poor	5.____
6. Deborah wrote a brief thank you letter the day after her job interview	Good Poor	6.____
7. Sally behaved naturally during her interview for a job	Good Poor	7.____
8. Bill stood at the interviewer's door at the end of his interview and told the interviewer about his unsuccessful part-time jobs	Good Poor	8.____
9. Barbara wore a comfortable sports outfit for a job interview	Good Poor	9.____
10. Sam failed to keep an appointment with his school placement counselor because he was busy playing tennis	Good Poor	10.____
11. Max enrolled in an advanced secretarial course in a local community college	Good Poor	11.____
12. Jill listed her part-time work experience in offices on her personal data sheet	Good Poor	12.____
13. Gerald checked the listings in the newspapers to learn of job vacancies in the city where he wanted to work	Good Poor	13.____
14. Since Paula had her typewriting grades with her, she asked if she could be excused from taking a typewriting test when she applied for a position	Good Poor	14.____
15. Since Larry had taken a job, he didn't answer the letter of another company offering him a position	Good Poor	15.____

Score________

SECTION B

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False" in the Answers column.

	Answers	For Scoring
1. There are few opportunities for specialized secretaries in modern business	________	1.____
2. Some companies provide tuition plans for employees who wish to study part-time	________	2.____
3. Public employment agencies charge a fee for their services	________	3.____
4. A family doctor can generally give a valuable reference about an applicant's skill in typewriting	________	4.____
5. Written tests are given to candidates for civil service positions	________	5.____
6. One who has good secretarial skills is ready for a management position	________	6.____
7. Most employers are not interested in the extracurricular activities in which prospective employees have participated while in school	________	7.____
8. An applicant should duplicate a letter of application when applying to many companies	________	8.____

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SECTION B (Continued)

Answers | For Scoring

9. There is little professional value in joining an association of office employees ________ 9.____
10. Secretarial positions are often ranked on the basis of the rank of executives' positions in a company ________ 10.____
11. The interview is a type of oral test used to evaluate candidates for a position ________ 11.____
12. A legal secretary must understand much legal terminology in order to do tasks successfully ________ 12.____
13. A secretary sometimes supervises the work of typists and clerks ________ 13.____
14. An individual should be able to predict the pattern of his or her career upon taking a first job ________ 14.____
15. Interviewers are expected to close each interview by indicating whether the applicant will be offered the job or not ________ 15.____
16. Applicants should leave spaces blank that don't apply to them ________ 16.____
17. Many community colleges provide specialized training in medical secretarial studies ________ 17.____
18. A secretarial position is as far as an office employee can expect to advance in a company ________ 18.____
19. Interviewers attempt to determine if a candidate is likely to work cooperatively with others ________ 19.____
20. Maintaining communications facilities is a common responsibility of administrative managers ________ 20.____
21. An applicant should fill in an application blank quickly because speed is the most important trait of a good office worker ________ 21.____
22. A beginning office worker should give little attention to the kind of organization in which he or she would like to work since office work is the same in all organizations ________ 22.____
23. There are job opportunities for office workers in educational institutions ________ 23.____
24. A beginning worker should learn about the employment fees that are to be paid before accepting a job through a private employment agency ________ 24.____
25. It is not proper to write to a company inquiring about job vacancies ________ 25.____

Score________

SECTION C

INSTRUCTIONS: Column I contains a list of qualities that are considered important in applicants being interviewed for positions in business offices. Column II contains samples of questions that the interviewer seeks to answer. The purpose of each question is to determine how well the applicant qualifies on each attribute. Identify the personal quality under review in each of the questions in Column II by selecting the appropriate quality in Column I and writing its *letter* in the Answers column.

COLUMN I	COLUMN II	Answers	For Scoring
A. Adaptability	1. Can the applicant view facts impartially?	________	1.____
B. Appearance	2. Is the applicant reasonably enthusiastic and optimistic?	________	2.____
C. Confidence	3. Is the applicant reasonably self-assured?	________	3.____
D. Courtesy	4. Is the applicant dressed appropriately?	________	4.____
E. Health	5. Does the applicant appear to be the kind of person who would remain calm and composed in all situations?	________	5.____
F. Intelligence	6. Is the applicant gracious and considerate?	________	6.____
G. Job interest	7. Does the applicant show concern about doing a job well?	________	7.____
H. Mental attitude	8. Does the applicant have the energy to undertake a job?	________	8.____
I. Objectivity	9. Does the applicant seem able to cope with changes?	________	9.____
J. Poise	10. Does the applicant show an ability to reason out problems and arrive at correct conclusions?	________	10.____

Score________

FINAL EXAMINATION

(Based on Units 9 through 15)

SECRETARIAL OFFICE PROCEDURES
(Ninth Edition)

Oliverio • Pasewark

South-Western Publishing Co.

Student ________________________________

Class ____________________ Section __________

SCORING RECORD	SCORES BY SECTION				TOTAL
	A	B	C	D	
Maximum	30	20	20	30	100
Student's Score					

SECTION A

INSTRUCTIONS: The answer to each of the following questions is either yes or no. Indicate your answer by underlining or circling "Yes" or "No" in the Answers column at the right.

	Answers	For Scoring
1. When speaking on the telephone, should you use a low-pitched voice?	Yes No	1.____
2. Is it wise to speak rapidly on the telephone to avoid taking up too much of the person's time?	Yes No	2.____
3. Should the telephone be answered on the first ring?	Yes No	3.____
4. Should you use the Yellow Pages when you wish to find out quickly where you may obtain a particular product	Yes No	4.____
5. Is there a type of copier for copying a page from a book?	Yes No	5.____
6. Are copies from a fluid duplicator more attractive than those from an offset duplicator?	Yes No	6.____
7. Is it possible to get a hundred good copies on a stencil duplicating machine?	Yes No	7.____
8. Is it possible to prepare a master of two or three colors for use on a fluid duplicator?	Yes No	8.____
9. Is the offset duplicator normally used when only a few copies are needed?	Yes No	9.____
10. In filing and retrieving frequently used materials, is it necessary to follow standard filing rules and procedures?	Yes No	10.____
11. Is a chronological file arranged according to time such as the year, month, or day?	Yes No	11.____
12. Is the most widely used method of filing based on the alphabet?	Yes No	12.____
13. In filing materials with business names, is the word *and* considered an indexing unit?	Yes No	13.____
14. Are hyphenated firm names indexed as if they were one word?	Yes No	14.____
15. Does sorting materials before filing actually save filing time?	Yes No	15.____
16. In an individual file folder, are letters arranged according to date, with the most recent record in front?	Yes No	16.____
17. To avoid removing important papers from the files, do many firms prepare photocopies of the requested record?	Yes No	17.____
18. Should the secretary's files contain inactive records?	Yes No	18.____
19. Do airlines ever mail tickets to prospective travellers?	Yes No	19.____
20. Are advanced reservations necessary for air shuttle flights?	Yes No	20.____
21. Is it necessary to make reservations for travel on most railroad coach cars?	Yes No	21.____
22. Is bus transportation ever used for business trips?	Yes No	22.____
23. Are passports required for travel to Canada and Mexico?	Yes No	23.____
24. Should petty cash receipts be signed by the person receiving the money?	Yes No	24.____
25. Is it a good idea to write checks in pencil?	Yes No	25.____
26. Does a restrictive indorsement allow you to send a check safely through the mail?	Yes No	26.____
27. Do public employment agencies usually charge a fee for their services?	Yes No	27.____
28. Are most employers interested in the extracurricular activities of a prospective employee?	Yes No	28.____
29. Before using the names of an individual for reference purposes, is it customary to ask that person's permission?	Yes No	29.____
30. Does the United States Civil Service Commission employ persons without prior office experience?	Yes No	30.____

Score__________

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SECTION B

INSTRUCTIONS: In each of the following names select the *first* indexing unit. Write that unit in the Answers column at the right of the name. The first name is given as a sample.

	Answers	For Scoring
0. St. Augustine Dairy, Inc.	Saint	0. √
1. Horace K. Miller		1.
2. Gerald Parke-Hill		2.
3. President Margaret Louise Walker		3.
4. Chi Lu Wong		4.
5. Phillip St. Charles		5.
6. Dr. Dennis Young		6.
7. Linda Rudd		7.
8. Robert van Metre		8.
9. Ralph DeLeon		9.
10. Howard P. Smith, III		10.
11. 1st National Bank of Cincinnati		11.
12. St. John's Art Supply		12.
13. Kansas Savings and Loan Co		13.
14. A-1 Cleaners		14.
15. Mountain View Inn		15.
16. The Camera Shop		16.
17. Hartford-Stowe Realtors		17.
18. Bradley Jacobson Catering Service		18.
19. South Eastern Travel Agency		19.
20. Econ-O-Me Plumbing		20.

Score________

SECTION C

INSTRUCTIONS: In each of the following sentences, select the item that best completes the statement and insert in the Answers column at the right the *letter* corresponding to the item selected.

	Answers	For Scoring
1. The Yellow Pages of a telephone directory classifies businesses alphabetically by: (A) location, (B) name, (C) product and service		1.
2. A call for which the station or person you are calling will pay the charges is a: (A) credit card call, (B) collect call, (C) direct distance dialing		2.
3. You must dial "O" for "Operator" before placing: (A) a collect call, (B) a station-to-station call, (C) a call for the out-of-town information operator		3.
4. The fastest way to make ten copies of a business paper would be to use a: (A) stencil duplicator, (B) fluid duplicator, (C) copier		4.
5. The most economical way of reproducing a short memorandum for an office staff in a department of 30 would be to use: (A) a copying process, (B) a fluid duplicating process, (C) a stencil duplicating process		5.

SECTION C (Continued)

	Answers	For Scoring
6. A notation inside a folder that a paper is filed elsewhere is called a: (A) cross-reference, (B) hard copy, (C) subject file	______	6.____
7. In filing, *coding* refers to: (A) marking the filing units on the paper so that it does not have to be reread each time it is removed from the files, (B) determining how a document is to be filed, (C) inserting a cross-reference sheet in the appropriate folder	______	7.____
8. The type of file used to keep track of unfinished, pending, and follow-up matters is called: (A) an alphabetic file, (B) a tickler file, (C) a chronological file	______	8.____
9. Included among the vital records of a corporation would be: (A) personnel records, (B) financial records, (C) advertisements of products	______	9.____
10. When a file folder begins to be crowded, the secretary should: (A) put the file folder in an inactive file and begin a new file with the same caption, (B) staple another file folder in front of the crowded one and label the new file folder with the same caption as the original, (C) subdivide into two or more folders and file in the same active file	______	10.____
11. Ordinarily domestic air travelers should check in at the appropriate airline ticket counter at the airport: (A) not less than one hour before departure time, (B) not less than 30 minutes before departure time, (C) not less than 5 minutes before departure time	______	11.____
12. After making travel arrangements for an executive, the travel agency will collect a fee from the: (A) executive, (B) executive's firm, (C) transportation company	______	12.____
13. A passport is obtained from the: (A) Department of State, (B) Treasury Department, (C) airline.	______	13.____
14. If, at the last minute, your employer cannot leave on a business trip, you should cancel the reservations: (A) within 24 hours, (B) immediately, (C) within 30 minutes of the scheduled flight departure	______	14.____
15. An endorsement on a passport granting permission to enter a foreign country for a certain purpose and length of time is called a: (A) timetable, (B) visa, (C) reservation	______	15.____
16. Immediately before you write a check, you should fill out the: (A) deposit slip, (B) bank statement, (C) check stub	______	1
17. One of the major advantages of paying by check is that the canceled check will ultimately be returned to the one who wrote it and thereby serve as a: (A) bank draft, (B) receipt, (C) deposit slip	______	17.____
18. A check which indicates on its face or on a detachable stub the specific invoice, bill, or service for which payment is made is called a: (A) certified check, (B) cashier's check, (C) voucher check	______	18.____
19. It is a good practice when signing checks to: (A) sign checks the same way each time, (B) sign checks a different way each time to prevent anyone from forging your signature, (C) alternate your signature each month	______	19.____
20. An appropriate complimentary close for a letter of application would be: (A) Affectionately yours, (B) Truly, (C) Sincerely yours	______	20.____

Score______

SECTION D

INSTRUCTIONS: Each of the following statements is either true or false. Indicate your answer by underlining or circling "True" or "False."

	Answers	For Scoring
1. It is generally a better procedure to ask a party to call back if the executive is out than to suggest that a message be left	True False	1.____
2. Secretaries should carefully answer all questions asked by anonymous callers	True False	2.____
3. The area code 800 indicates a WATS number	True False	3.____

SECTION D (Continued)

	Answers	For Scoring
4. A Mailgram is generally a faster service than a telegram	True False	4.____
5. An honor system, which merely requires the user of a file to promise to return the file to its proper place in the file cabinet, is the simplest and most efficient charge-out system for an office	True False	5.____
6. There are some materials that are best organized by subject for the files	True False	6.____
7. Geographic filing is a method of filing individual correspondence according to location	True False	7.____
8. Microfilming is a good system for storing inactive files but is not practical for files that must be used frequently	True False	8.____
9. Good filing systems don't have folders for miscellaneous items	True False	9.____
10. Carbon copies should show the release marks before they are filed	True False	10.____
11. Sometimes a photocopy of a letter is used as a cross reference	True False	11.____
12. Sorting is not necessary if the file cabinets are near the place where the secretary generally does most of the filing tasks	True False	12.____
13. The most recent correspondence should be at the front of the file folder	True False	13.____
14. A master for an offset duplicator can be prepared on a typewriter if a carbon typewriter ribbon is used	True False	14.____
15. A special type of eraser is needed to make corrections on a stencil	True False	15.____
16. The carbon paper needed to prepare masters for the fluid duplicator may be used several times, but generally no more than five times	True False	16.____
17. An itinerary is a detailed plan for expenditures during the forthcoming fiscal period	True False	17.____
18. Secretaries can get information about both international and domestic air service from travel agents	True False	18.____
19. Travelers' checks are of limited value in international travel	True False	19.____
20. When a hotel room is requested by telephone, the confirmation is sometimes made immediately by telephone	True False	20.____
21. Secretaries have little to do when their executives are out of town	True False	21.____
22. It is possible to stop payment on a check	True False	22.____
23. In banks where computers are used for recordkeeping, customers have no need to reconcile their bank statements	True False	23.____
24. Certified checks are the most commonly used checks for business transactions	True False	24.____
25. There are both domestic and international money orders	True False	25.____
26. Requisitioning is an unnecessary procedure if there is an approved budget for all expenditures in a particular office	True False	26.____
27. Because the expenditures handled are very small, there is no need to maintain records for a petty cash fund	True False	27.____
28. Applicants should fill in application forms with great care	True False	28.____
29. Secretaries are sometimes promoted to nonsecretarial positions	True False	29.____
30. A high school graduate should outline clearly the pattern of his or her career before beginning a first full-time job	True False	30.____

Score________

1st SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Unit 1, Part 1 & 2	1	Unit 5, Part 2 & 3
2	Unit 1, Part 2 Unit 2, Part 1	2	Unit 5, Part 3 & 4
3	Unit 2, Part 1 & 2	3	Unit 5, Part 4 Test 4 Unit 6, Part 1
4	Unit 2, Part 2 & 3	4	Unit 6, Part 1 & 2
5	Unit 2, Part 3 Test 1 Unit 3, Part 1	5	Unit 6, Part 2 & 3 Unit 7, Part 1
6	Unit 3, Part 2 & 3	6	Unit 7, Part 1 & 2
7	Unit 3, Part 3 Test 2 Unit 4, Part 1	7	Unit 7, Part 2 & 3 Test 5
8	Unit 4, Part 1 & 2	8	Unit 8, Part 1 & 2
9	Test 3 Unit 5, Part 1	9	Test 6 Review Mid-term Examination

2nd SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Unit 9, Part 1 & 2	1	Unit 13, Part 1 & 2
2	Unit 9, Part 2, 3 & 4	2	Unit 13, Part 2 Test 10 Unit 14, Part 1
3	Test 7 Unit 10, Part 1	3	Unit 14, Part 1 & 2
4	Unit 10, Part 2 Test 8	4	Unit 14, Part 2 & 3
5	Unit 11, Part 1 & 2	5	Unit 14, Part 4 Test 11 Unit 15, Part 1
6	Unit 11, Part 2 & 3	6	Unit 15, Part 1 & 2
7	Unit 11, Part 3 & 4	7	Unit 15, Part 2 & 3
8	Unit 12, Part 1 & 2	8	Unit 15, Part 4 & 5
9	Unit 12, Part 3 & 4 Test 9	9	Test 12 Review Final Examination

Name ______________________________

FIRST SEMESTER

First Quarter				Second Quarter			
	Total	Cum	Total Possible		Total	Cum	Total Possible
Unit 1, Part 1				Unit 5, Part 2			
Part 2				Part 3			
Unit 2, Part 1				Part 4			
Part 2				Test 4			
Part 3				Unit 6, Part 1			
Test 1				Part 2			
Unit 3, Part 1				Part 3			
Part 2				Unit 7, Part 1			
Part 3				Part 2			
Test 2				Part 3			
Unit 4, Part 1				Test 5			
Part 2				Unit 8, Part 1			
Test 3				Part 2			
Unit 5, Part 1				Test 6			
				Mid-Term Exam			

Name ____________________

SECOND SEMESTER

Third Quarter

	Total	Cum	Total Possible
Unit 9, Part 1			
Part 2			
Part 3			
Part 4			
Test 7			
Unit 10, Part 1			
Part 2			
Test 8			
Unit 11, Part 1			
Part 2			
Part 3			
Part 4			
Unit 12, Part 1			
Part 2			
Part 3			
Part 4			
Test 9			

Fourth Quarter

	Total	Cum	Total Possible
Unit 13, Part 1			
Part 2			
Test 10			
Unit 14, Part 1			
Part 2			
Part 3			
Part 4			
Test 11			
Unit 15, Part 1			
Part 2			
Part 3			
Part 4			
Part 5			
Test 12			
FINAL EXAM			

RECORDKEEPING

RECORDKEEPING

Class is designed to utilize realistic business problems so that students can acquire those basic entry-level recordkeeping skills needed in sales and office occupations. Class will also include personal recordkeeping activities.

Materials Needed:

Practical Recordkeeping, Southwestern Publishing Co.

Time Line:

1st Semester:

			Job	Weeks
Unit:	1.	Recordkeeping Basic Skills	1-4	1
	2.	Recordkeeping for Cashiers	5-11	2-3
	3.	Recordkeeping Banking	12-21	2-3
	4.	Recordkeeping for Petty Cash	22-26	2
	5.	Recordkeeping for Students and Families	27-30	2
	6.	Recordkeeping for Retail Sales Clerks	31-42	4
	7.	Recordkeeping for Stock Clerks	43-47	2-3
		TOTAL		15-18

2nd Semester:

			Job	Weeks
Unit:	8.	Recordkeeping for a Purchasing Department	48-56	3
	9.	Recordkeeping for a Wholesale Sales Depart.	57-65	3-4
	10.	Recordkeeping for a Payroll Department: Computing Total Wages	66-73	2-3
	11.	Recordkeeping for a Payroll Department: Computing Net Pay	74-83	3
	12.	Recordkeeping for Small Retail Business	84-96	4-5
		TOTAL		15-18

Grading:

Tests - First Semester

Test 1	Units 1 & 2
Test 2	Unit 3
Test 3	Units 4 & 5
Test 4	Units 6 & 7

Tests - Second Semester

Test 5	Unit 8
Test 6	Unit 9
Test 7	Units 10 & 11
Test 8	Unit 12

Your grade will be based on quality and quantity of work performed according to the following scale:

Grade	Quantity	Quality
A	See Record	90%
B	Sheet for	80%
C	each Quarter	75%
D	and Semester	70%

Job points and tests will be averaged together to determine your quarter and semester averages.

Grading Continued:

If however, you have not maintained the quality level to match the quantity level, your grade will be lowered to that of the quality level.

Unexcused Tardies and Absences:

For each two unexcused tardies (no note from previous teacher, parent, or office), ½ hour of detention will be awarded. For each unexcused absence, 1 hour of detention will be awarded. For each ½ hour of detention not served, 30 points will be deducted from your quality score.

BASIC MINIMUM COMPETENCIES

Prerequisite: None
Credit: 1 per semester
Satisfies: 1 vocational credit per semester

After satisfactorily completing the course, the student will be able to:

1. identify the information-related activities required for recordkeeping, such as:
   - a. gathering
   - b. recording
   - c. classifying and sorting
   - d. computing
   - e. reporting
   - f. communicating
   - g. filing
2. verify accuracy of records by:
   - a. examining for completeness
   - b. checking for transpositions
   - c. checking spacing and punctuation
   - d. matching forms for accuracy
3. plan personal finances by:
   - a. identifying goals
   - b. determining wants and needs
4. prepare a budget.
5. identify need for keeping records of expenditures for:
   - a. food
   - b. clothing
   - c. housing
   - d. health care
   - e. transportation
   - f. education
6. classify cash payments.
7. prepare a statement of income and expenses.
8. identify means of obtaining credit, such as:
   - a. charge accounts
   - b. credit cards
   - c. installment plans
   - d. personal loans
9. demonstrate proper methods of preparing ownership records, such as:
   - a. personal property inventory.
   - b. insurance policy records.
   - c. statement of financial condition.
10. identify methods of protecting and storing business records, such as:
    - a. safety deposit boxes
    - b. fireproof boxes or cabinets
    - c. expandable record files
    - d. bound record books
11. demonstrate procedures for maintaining accounts, such as:
    - a. opening accounts
    - b. making deposits
    - c. writing checks
    - d. identifying payments
    - e. reconciling bank statements
    - f. endorsing methods

Objectives continued:

12. prepare documents necessary to maintain a bank account, such as:
    a. making deposits
    b. making withdrawals
    c. interpreting records of account
13. demonstrate ability to interpret and use promissory notes.
14. identify/use sources of information relating to automobile purchases, such as:
    a. purchase window stickers
    b. consumer magazines and brochures
    c. NADA blue book
    d. certificate of title and registration
    e. records of costs and expenses
15. prepare tax records, such as:
    a. sales tax
    b. property tax
    c. social security tax
    d. income tax
16. identify use of cash control methods practiced in business, such as:
    a. cash register security
    b. sales records
    c. methods of handling incoming checks
    d. making refunds
    e. cash proof forms
17. prepare cash payment records, such as:
    a. verifying invoices
    b. writing business checks
    c. using check protectors
    d. preparing vouchers
    e. using classified cash books
18. prepare petty cash records, such as:
    a. petty cash vouchers
    b. petty cash proof
    c. petty cash summary
    d. petty cash replenishment
    e. petty cash book
19. prepare sales records, such as:
    a. cash register tapes
    b. sales slips
    c. charge slips
    d. credit memos
    e. accounts receivable ledgers
    f. statements of accounts
    g. sales reports
20. interpret information on sales records, such as:
    a. cash register tapes
    b. sales slips
    c. charge slips
    d. credit memos
    e. accounts receivable ledgers
    f. statements of accounts
    g. sales reports
21. prepare purchase records, such as:
    a. inventory cards
    b. purchase requisitions
    c. quotations
    d. purchase orders
    e. purchase invoices
    f. accounts payable ledgers
22. interpret information on purchase records, such as:
    a. inventory cards
    b. purchase requisitions
    c. quotations
    d. purchase orders
    e. purchase invoices
    f. accounts payable ledgers

Objectives continued:

23. describe inventory methods, such as:
    a. perpetual
    b. physical
    c. periodic
24. prepare and/or use payroll records, such as:
    a. earnings records
    b. time cards
    c. payroll registers
    d. employers' tax guides
    e. payroll checks
    f. payroll tax reports
25. use filing systems, including:
    a. alphabetic
    b. numeric
    c. subject
26. use data processing procedures and techniques, such as:
    a. pegboards
    b. edge-notched cards
    c. electronic calculators
    d. computer input
    e. computer output
27. use the terms debit and credit correctly.
28. record changes in account balances as a result of transactions affecting:
    a. asset accounts
    b. liability accounts
    c. capital accounts
29. use journals, such as:
    a. general journal
    b. sales journal
    c. purchases journal
    d. cash payments journal
    e. cash receipts journal
30. post to business ledgers from:
    a. journals
    b. source documents
31. identify and prepare business financial statements, such as:
    a. trial balance
    b. income statements
    c. schedule of accounts receivable
    d. schedule of accounts payable
32. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    a. attendance
    b. punctuality
    c. good grooming
    d. honesty
    e. dependability
    f. ability to handle criticism
    g. ability to handle rumors & gossip
    h. commitment to the job
    i. handling stress
    j. discretely handling confidential information
    k. maintaining an organized work area
    l. exercising care in handling papers and using machines
    m. working in a team
    n. ethics

Objectives continued:

33. display growth and development in positive personal characteristics, including:
    - a. cooperation
    - b. creativity
    - c. enthusiasm
    - d. fairness in dealing with others
    - e. handling work with interruptions
    - f. initiative
    - g. loyalty
    - h. self-starter
    - i. open-mindedness
    - j. positive reinforcement
    - k. positive thinking
    - l. time management
    - m. economical use of materials and supplies
    - n. self-confidence
    - o. sense of humor
    - p. tactfulness
    - q. verbal, non-verbal expression
    - r. keeping informed of employer's growth, needs and deadlines
34. practice safe working habits, such as exercising care in:
    - a. operating business machines
    - b. using equipment - stapler, file cabinet, chair, typewriter
    - c. maintaining an organized work area
    - d. handling electrical cords, etc.
35. demonstrate leadership abilities in work situations, including:
    - a. independent problem-solving ability.
    - b. independent decision-making ability.
    - c. ability to plan, coordinate, and implement plans requiring teamwork.
    - d. critiquing work of others and offering suggestions for improvement.
    - e. ability to lead group activities.
    - f. ability to delegate tasks and responsibilities.
    - g. ability to prioritize tasks.
36. identify careers utilizing recordkeeping skills and describe application of those skills to the career.

Learner Outcomes:

1. The student will, with 90% accuracy, be able to verify that numbers on records completed agree with numbers taken from source documents.
2. Given a group of source documents, the student will, with 85% accuracy, be able to transfer and enter the information in the appropriate record.
3. Given a bank statement, the student will be able to provide an accurate written interpretation of the statement.

RECORDKEEPING

NAME ______________________________ Date __________________

Last Job Completed ____________________________

Test Requested ____________________________

RECORDKEEPING

NAME ______________________________ Date __________________

Last Job Completed ____________________________

Test Requested ____________________________

1st SEMESTER TIMF SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Jobs 1-4	1	Jobs 27-30
2	Jobs 5-11	2	Jobs 27-30 Test 3
3	Jobs 5-11	3	Jobs 31-42
4	Jobs 5-11 Test 1	4	Jobs 31-42
5	Jobs 12-21	5	Jobs 31-42
6	Jobs 12-21	6	Jobs 43-47
7	Jobs 12-21 Test 2	7	Jobs 43-47
8	Jobs 22-26	8	Jobs 43-47
9	Jobs 22-26	9	Jobs 43-47 Test 4

2nd SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Jobs 48-56	1	Jobs 74-83
2	Jobs 48-56	2	Jobs 74-83
3	Jobs 48-56 Test 5	3	Jobs 74-83 Test 7
4	Jobs 57-65	4	Jobs 84-96
5	Jobs 57-65	5	Jobs 84-96
6	Jobs 57-65 Test 6	6	Jobs 84-96
7	Jobs 66-73	7	Jobs 84-96 Test 8
8	Jobs 66-73	8	Practice Set
9	Jobs 66-73	9	Practice Set

RECORD KEEPING SEMESTER - 1 - Name ____________

J #	TEST		Your Score	80%	Possible Pts		Cum Points	
1	X			48	60			
2	X			40	50			
3	X			26	32			
4	X			77	96			
5	X			43	60			
6	X			64	80			
7	X			44	55			
8	X			48	60			
9	X			192	240			
10	X			40	50			
11	X			48	60			
X	TEST 1				200			
12	X			60	75			
13	X			48	60			
14	X			64	80			
15	X			48	60			
16	X			48	60			
17	X			48	60			
18	X			32	40			
19	X			40	50			
20	X			56	70			
21	X			48	60			
X	TEST 2				200			
22	X			24	36			
23	X			32	40			
24	X			32	40			
25	X			32	40			
26	X			47	59			
27	X			50	63			
28	X			54	68			
29	X			41	51			
[illegible]	X			32	40			
X	TEST 3				200			
31	X			40	50			
32	X			31	39			
33	X			48	60			

JOB #	TEST		Your Score	80%	Possible Points		Cum Points	
34	X			48	60			
35	X			64	80			
36	X			32	40			
37	X			32	40			
38	X			32	40			
39	X			64	80			
40	X			48	60			
41	X			56	70			
42	X			28	35			
43	X			35	44			
44	X			78	97			
45	X			28	35			
46	X			42	53			
47	X			22	28			
X	TEST 4				200			

Record Keeping   Semester II   Name ____________

Job #	TEST		Your Score	Possible Points			Grade Goals	
							Quarter	Semester
48				10				
49				10				
50				10				
51				10				
52				10				
53				10				
54				10				
55				10				
56				10				
X	TEST 5			100				
57				10				
58				10				
59				10				
60				10			D 70%	
1				10				
62				10				
63				10				
64				10				
65				10				
X	TEST 6			100			C 75%	
66				10				
67				10				
68				10				
69				10			B 80%	
70				10				
71				10				
72				10				
73				10			A 90%	
74				10				
75				10				
76				10				
7				10				
78				10				
79				10				
80				10				
81				10				

Job #	Test		Your Score	Possible Points			Grade Goals	
82				10				
83				10				
X	TEST 7			100				D 70%
84				10				
85				10				
86				10				
87				10				
88				10				
89				10				
90				10				C 75%
91				10				
92				10				
93				10				
94				10				
95				10				
96				10				
X	TEST 8			100				B 80%
Practice Set								A 90%

ACCOUNTING

PHILOSOPHY

Value of Accounting to the Student

A. Accounting and Vocational Competence
   1. Business occupations
      a. Owner of business
      b. Accountant - Private
      c. Accountant - CPA
      d. Typist - Financial statements, etc.

B. Accounting and Economic Decisions
   1. Manage family wisely - balance checking account
   2. Intelligent decisions in daily life

C. Accounting and Automation
   1. Study of accounting is necessary for both hand-kept and machine-kept records
   2. Computers

OBJECTIVES

A. To help develop the student's understanding of the economic activities of the business world.

B. To contribute to the student's competence in managing his/her personal business affairs.

C. To help prepare the student to earn a living (vocational objectives).

D. Develop work habits that are important to success in personal and business activities.

E. To contribute to the student's general education.

WHAT I EXPECT FROM YOU

A. Expected to be in assigned place by starting time each day and work on appropriate course work for the entire class period. At the end of the class period, you will be expected to clean up your work area, rewind all tapes, turn off all machines, and return all materials.

B. Realize that regular and punctual attendance are important to succeed in accounting. You will be expected to follow the School Attendance Policy.

C. If necessary, you may have to work outside of class time to stay on schedule.

GRADING

A. Absences and tardies may be used as a basis for grades if they are excessive.

B. Required work - All drills and problems assigned must be completed. You will then correct your own work, making any and all necessary corrections. The problems will then be turned in to the teacher who will note it in the grade book and on your record sheet. You will receive no grade credit for these assignments but if the problems are not done correctly and turned in you will receive negative credit for these problems. This simply means that you will lose credit for problems and drills not turned in.

C. Your grade will be based on quantity and quality of work performed according to the following scale:

Grade	Quantity	Quality
A	(See Record	90%
B	Sheet for Each	80%
C	Quarter and	75%
D	Semester)	70%

Study guides, quizes and tests will be averaged together to determine your quarter and semester averages. If however, you have not maintained the quality level to match the quantity level, your grade will be lowered to that of the quality level.

Note: Work must be completed in the order as given on the Record Sheet - it will not be taken out of order. Homework must be completed and corrected (if necessary) before tests will be taken. Unit tests must be taken before the succeeding chapters can be done and credit received for them.

ACCOUNTING I & II

Assigned Seats - Each student is expected to be in his/her assigned seat when the tardy bell rings. Desks and students are to always be facing the front of the room.

Unexcused Tardies and Absences - For each unexcused absence (no note from previous teacher, parent, or office), one-half hour of detention will be awarded. For each unexcused absence, one hour of detention will be awarded. For each one-half hour of detention, not served, 30 points will be deducted from your total points. Detention may also be assigned to those students not working in class or not working on assigned classroom material, one-half hour per occurance.

ACCOUNTING I

Objectives:

1. To demonstrate entry-level employment skill in accounting work such as sales records, purchase records, cash receipts records, payroll records.
2. To demonstrate the proper use of accounting records and forms such as source documents, accounts, ledgers, journals, computer input and output.
3. To demonstrate a working knowledge of accounting procedures such as journalizing, posting, preparing financial reports.
4. To demonstrate proper techniques in recording data and making corrections.
5. To operate a ten-key machine using the touch system.
6. To follow written and oral directions.
7. To use business terminology.
8. To apply basic math skills.
9. To practice decision-making and problem-solving through simulated office tasks.
10. To apply job search techniques.
11. To demonstrate an awareness of the need for typing and filing skills in accounting.
12. To demonstrate an awareness of the effect of debit and credit on accounting records.
13. To demonstrate an understanding of the accounting equation.
14. To analyze the effects of business transactions on the accounting records.
15. To understand the consequences of positive and negative traits in a business office.
16. To recognize the importance of leadership skills.
17. To practice safe working habits.

Materials Needed:

1. Accounting 10/12, 4th Edition, Weaver, Hanna, Freeman, Brower, Smiley.
2. Accounting 10/12 Series, Part 1, Individualized Learning Guides for Elements of Financial Records, 4th Edition
3. Allen Electronic Service Practice Set, 3rd Edition, Weaver, Hanna, Freeman, Brower, Smiley
4. No. 2 pencil - to be purchased by student
5. 2" three-ring binder - to be purchased by student
6. Ten-key calculator or student's pocket calculator

Grading:

Letter and/or numerical grades for each unit will be included in the LAP for each chapter. Optional work may be completed for bonus points only if requirements have been finished. You are to complete the chapter work according to maximum class time allowed per unit and take the test no more than three days later. If you submit your chapter work late or delay your test day, your chapter grade and test grade will be lowered one full letter grade.

	1st Nine Weeks	2nd Nine Weeks
Chapter Work & Practice Set	40%	40%
Chapter Tests	40%	40%
Comprehensive Test & Practice Set Test	20%	20%

BASIC MINIMUM COMPETENCIES

Prerequisite: Office Machines

Credit: 1

Satisfies: 1 vocational credit

Students will study the vocabulary of accounting, the relationship between accounting and business, and the accounting cycle in its simplest form.

Upon satisfactorily completing Accounting I, the student will be able to:

1. write numbers legibly.
2. follow oral instructions.
3. follow written instructions.
4. apply basic math skills to accounting problems.
5. perform operations involving calculating, recording, summarizing, and verifying accounting data.
6. apply the accounting equation by:
   a. classifying accounts.
   b. analyzing transactions and determining accounts affected.
   c. determining the effect a transaction has on accounts.
   d. debiting and crediting the appropriate accounts.
7. record entries from written instructions in accounting journals.
8. use the proper techniques for making corrections in journals and ledgers.
9. post from journals to ledger accounts.
10. maintain a checking account.
    a. write checks
    b. prepare deposit slips
    c. reconcile bank statements
11. complete a six-column worksheet.
12. demonstrate a working knowledge of the purpose for the worksheet by:
    a. preparing the appropriate financial statements.
    b. recording the entries required to close the temporary accounts at the end of a fiscal period.
13. prepare a post-closing trial balance.
14. prepare a capital statement.
15. record information from source documents.
16. define accounting vocabulary.

Objectives continued:

17. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    a. attendance
    b. punctuality
    c. good grooming
    d. honesty
    e. dependability
    f. ability to handle criticism
    g. ability to handle rumors & gossip
    h. commitment to the job
    i. handling stress
    j. discretely handling confidential information
    k. maintaining an organized work area
    l. exercising care in handling papers and using machines
    m. working in a team
    n. ethics
18. display growth and development in positive personal characteristics, including:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. fairness in dealing with others
    e. handling work with interruptions
    f. initiative
    g. loyalty
    h. self-starter
    i. open-mindedness
    j. positive reinforcement
    k. positive thinking
    l. time management
    m. economical use of materials and supplies
    n. self-confidence
    o. sense of humor
    p. tactfulness
    q. verbal, non-verbal expression
    r. keeping informed of employer's growth, needs and deadlines
19. demonstrate leadership abilities in work situations, including:
    a. independent problem-solving ability.
    b. independent decision-making ability.
    c. ability to plan, coordinate, and implement plans requiring teamwork.
    d. critiquing work of others and offering suggestions for improvement.
    e. ability to lead group activities.
    f. ability to delegate tasks and responsibilities.
    g. ability to prioritize tasks.
20. relate accounting skills and abilities to careers utilizing those accounting skills and abilities.
21. demonstrate safe working habits, such as exercising care in:
    a. operating business machines.
    b. using equipment - stapler, file cabinet, chair, typewriter
    c. maintaining an organized work area.
    d. handling electrical cords, etc.

Optional Competency:

Perform by touch on a 10-key machine the basic math functions.

Learner Outcomes:

1. Given a typical business transaction such as, "Bought merchandise on account," the student will, with 100 percent accuracy, be able to:
    - a. name the accounts affected by the transaction
    - b. classify the accounts named in "a"
    - c. indicate whether the accounts are increased or decreased
2. Given a completed worksheet, the student will be able to prepare an income statement that is completely accurate.

BASIC MINIMUM COMPETENCIES

Prerequisite: Accounting I

Credit: 1

Satisfies: 1 vocational credit

Students will study the procedures for adjustments, payroll, sales tax and computer processing of data. Special and combination journals will be used.

Upon satisfactorily completing Accounting I, the student will be able to meet all of the competencies required, and will be able to:

1. apply basic accounting procedures to special journals.
2. apply basic accounting procedures to the combination journals.
3. apply special accounting procedures involving:
    - a. adjustments
    - b. sales returns and allowances
    - c. purchase returns and allowances
    - d. sales discounts
    - e. purchase discounts
    - f. payroll records
    - g. petty cash
    - h. sales tax
4. relate the relationship between accounting subsystems and accounting controls.
5. apply generally accepted accounting procedures to accounting functions.
6. practice safe working habits, such as exercising care in:
    - a. operating business machines.
    - b. using equipment - stapler, file cabinet, chair, typewriter.
    - c. maintaining an organized work area.
    - d. handling electrical cords, etc.
7. relate accounting skills and abilities to careers utilizing those accounting skills and abilities.
8. display growth and development in positive personal characteristics, including:
    - a. cooperation
    - b. creativity
    - c. enthusiasm
    - d. fairness in dealing with others
    - e. handling work with interruptions
    - f. initiative
    - g. loyalty
    - h. self-starter
    - i. open-mindedness
    - j. positive reinforcement
    - k. positive thinking
    - l. time management
    - m. economical use of materials and supplies
    - n. self-confidence
    - o. sense of humor
    - p. tactfulness
    - q. verbal, non-verbal expression
    - r. keeping informed of employer's growth, needs and deadlines

Objectives continued:

9. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    - a. attendance
    - b. punctuality
    - c. good grooming
    - d. honesty
    - e. dependability
    - f. ability to handle criticism
    - g. ability to handle rumors & gossip
    - h. commitment to the job
    - i. handling stress
    - j. discretely handling confidential information
    - k. maintaining an organized work area
    - l. exercising care in handling papers and using machines
    - m. working in a team
    - n. ethics
10. demonstrate leadership abilities in work situations, including;
    - a. independent problem-solving ability.
    - b. independent decision-making ability.
    - c. ability to plan, coordinate, and implement plans requiring teamwork.
    - d. critiquing work of others and offering suggestions for improvement.
    - e. ability to lead group activities.
    - f. ability to delegate tasks and responsibilities.
    - g. ability to prioritize tasks.

Optional Competencies:

The student will be able to:

1. process accounting data through:
    - a. computer input
    - b. computer storage
    - c. arithmetic logic
    - d. control
    - e. computer output
2. apply special accounting procedures involving recording of:
    - a. depreciation
    - b. disposal of fixed assets
    - c. writing off bad debts

Learner Outcomes:

Given selected business transactions, the student will be able to journalize them with complete accuracy in a combination journal.

ACCOUNTING I

INDIVIDUAL PROGRESS CHART

Name ____________

Book No. ____

10 11 12 First 9 Weeks ____

Second 9 Weeks ____

Chapter No.	Maximum Class Time	Starting Date	Finishing Date	Chapter GRADE	TEST Date & %
1	7				
2	6				
3	6				
4	7				
Comprehensive Test 1 (Study Chapter Tests 1, 2, 3, and 4)					
5	5				
6	7				
Project 1	3				
7	7				
8	9				
Comprehensive Test 2 (Study Chapter Tests 5, 6, 7, and 8)					
Allen Electronic Set (2 letter grades)	15			/	

You are to complete the chapter work according to maximum class time allowed per unit and take the test no more than three days later. If you submit your chapter late or delay your test day, your chapter grade and test grade will be lowered one full letter grade.

OPTIONAL WORK may be completed for bonus points only if requirements have been finished.

Chapter Test Scale		Grade Point Scale
100 - 95%	A	4.0 - 3.6
94 - 85%	B	3.5 - 2.6
84 - 75%	C	2.5 - 1.6
74 - 70%	D	1.5 - .6
69 below	F	.5 - 0

Semester Grading	
Chapter Work & Practice Set	40%
Chapter Tests	40%
Comprehensive Tests & Practice Set Test	20%

Semester Grade ________

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Accounting

ACCOUNTING I

INDIVIDUAL PROGRESS CHART

Chapter No.	Maximum Class Time	Starting Date	Finishing Date	Chapter GRADE	TEST Date & %
9	8				
10	6				
11	6				
12	5				
Comprehensive Test 3 (Study Chapter Tests 9, 10, 11, 12)					
13	8				
14	7				
15	6				
16	5				
Comprehensive Test 4 (Study Chapter Tests 13, 14, 15, and 16)					
Project 2	4				
17	5				
18	4				
19	4				
Project 3	4				
20	4				
21	5				
22	3				
Final Examination					

NAME __________________

Book No. ________

10 11 12 First 9 Weeks ________

Second 9 Weeks ________

1st SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Preface Chapter 1	1	Project 1
2	Chapter 1 Chapter 2	2	Project 1 Chapter 7
3	Chapter 2	3	Chapter 7
4	Chapter 3	4	Chapter 8
5	Chapter 4	5	Chapter 8
6	Test 1	6	Test 2
7	Chapter 5	7	Allen Electronics Practice Set
8	Chapter 6	8	Allen Electronics Practice Set
9	Chapter 6	9	Allen Electronics Practice Set

2nd SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Chapter 9	1	Chapter 16
2	Chapter 9 Chapter 10	2	Test 4
3	Chapter 10 Chapter 11	3	Project 4 Chapter 17
4	Chapter 12	4	Chapter 17 Chapter 18
5	Test 3	5	Chapter 19 Project 3
6	Chapter 13	6	Project 3 Chapter 20
7	Chapter 13 Chapter 14	7	Chapter 21
8	Chapter 14	8	Chapter 22
9	Chapter 15	9	Chapter 23 Final Examination

1st SEMESTER

NAME______________________ DATE______________________

Chapter	Pts	Poss. Pts	Cum Pts	Percentage
1 Problem C-1				
C-2				
C-3				
C-4				
C-5				
C-6				
2 Problem C-7				
C-8				
C-9				
3 Problem C-10				
C-11				
C-12				
C-13				
4 Problem C-14				
C-15				
C-16				
C-17				
C-18				
C-20				
C-21				
5 Problem C-22				
C-23				
C-24				
6 Problem C-25				
C-26				
C-27				
Project 1				
7 Problem C-28				
C-29				
C-30				
C-31				
C-32				
C-33				
8 Problem C-34				
C-35				
C-36				
Test 2				
Allen Electronics				

2nd SEMESTER

NAME ______________________________ DATE _________________________

Chapter	Pts.	Poss. Pts.	Cum. Pts.	Percent
9 Problem C-37				
10 Problem C-1				
C-2				
11 Problem C-3				
C-4				
12 Problem C-5				
C-6				
13 Problem C-7				
C-8				
14 Problem C-9				
C-10				
15 Problem C-11				
16 Problem C-12				
C-13				
C-14				
Project 2				
17 Problem C-1				
C-2				
C-3				
C-4				
18 Problem C-5				
C-6				
19 Problem C-7				
C-8				
C-9				
C-10				
Project 3				
20 Problem C-12				
21 Problem C-13				
C-14				
C-15				
22 Problem C-16				
C-17				
FINAL EXAMINATION				

BASIC MINIMUM COMPETENCIES

Prerequisite: Accounting I, Office Machines

Credit: 1

Satisfies: 1 vocational credit

Students will study accounting for partnerships, departmentalized accounting, inventory control, and voucher systems.

After satisfactorily completing Accounting II, the student will be able to meet the competencies listed for Accounting II and will be able to:

1. record the accounting entries necessary to form a partnership.
2. record the entries necessary for dividing the income or loss of a partnership.
3. record the entries necessary to complete the end-of-fiscal period accounting for a partnership.
4. record business transactions for a departmentalized business.
5. record business transactions involving transportation charges.
6. record business transactions involving C.O.D. sales.
7. apply the appropriate accounting functions to process data for inventory control systems including:
    a. periodic
    b. perpetual
    c. costing methods
        (1) LIFO
        (2) FIFO
8. apply correct accounting procedures to a voucher system.
9. relate accounting skills and abilities to careers utilizing those accounting skills and abilities.
10. practice safe working habits, such as exercising care in:
    a. operating business machines.
    b. using equipment - stapler, file cabinet, chair, typewriter.
    c. maintaining an organized work area.
    d. handling electrical cords, etc.
11. demonstrate leadership abilities in work situations, including:
    a. independent problem-solving ability.
    b. independent decision-making ability.
    c. ability to plan, coordinate, and implement plans requiring teamwork.
    d. critiquing work of others and offering suggestions for improving.
    e. ability to lead group activities.
    f. ability to delegate tasks and responsibilities.
    g. ability to prioritize tasks.

Objectives continued:

12. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    a. attendance
    b. punctuality
    c. good grooming
    d. honesty
    e. dependability
    f. ability to handle criticism
    g. ability to handle rumors & gossip
    h. commitment to the job
    i. handling stress
    j. discretely handling confidential information
    k. maintaining an organized work area
    l. exercising care in handling papers and using machines
    m. working in a team
    n. ethics
13. display growth and development in positive personal characteristics, including:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. fairness in dealing with others
    e. handling work with interruptions
    f. initiative
    g. loyalty
    h. self-starter
    i. open-mindedness
    j. positive reinforcement
    k. positive thinking
    l. time management
    m. economical use of materials and supplies
    n. self-confidence
    o. sense of humor
    p. tactfulness
    q. verbal, non-verbal expression
    r. keeping informed of employer's growth, needs and deadlines

Learner Outcomes:

On a vocabulary quiz, listing business terms and providing definitions in random order to such terms, the student will, with 100% accuracy be able to match the terms periodic and perpetual inventory systems and LIFO and FIFO costing methods with the definitions which best describe these terms.

Materials Needed:

Century 21 Accounting Practice Sets and Workbooks, Southwestern Publishing Company

BASIC MINIMUM COMPETENCIES

Prerequisites: Accounting II, first semester

Credit: 1

Satisfies: 1 vocational credit

Students will study accounting for corporations, cost accounting, accounting for uncollectible accounts, depreciation, prepaid and accrued items, budgetary planning and control, and automated data processing applications.

After satisfactorily completing Accounting II, the student will be able to meet the competencies listed for Accounting II and will be able to:

1. process entries for:
    - a. formation of a corporation.
    - b. acquisition of capital by a corporation.
    - c. distribution of dividends to stockholders by a corporation.
    - d. end-of-fiscal period accounting for a corporation.
    - e. direct method of accounting for uncollectible accounts.
    - f. allowance method of accounting for uncollectible accounts.
    - g. depreciation of assets
        - (1) straight-line method
        - (2) declining balance method
        - (3) sum-of-the-years digits method
    - h. disposal of fixed assets
    - i. prepaid items
    - j. accrued items
2. identify budgetary planning and control procedures.
3. demonstrate in classroom situations positive work habits and traits required in a business office, such as:
    - a. attendance
    - b. punctuality
    - c. good grooming
    - d. honesty
    - e. dependability
    - f. ability to handle criticism
    - g. ability to handle rumors & gossip
    - h. commitment to the job
    - i. handling stress
    - j. discretely handling confidential information
    - k. maintaining an organized work area
    - l. exercising care in handling papers and using machines
    - m. working in a team
    - n. ethics
4. display growth and development in positive personal characteristics, including:
    - a. cooperation
    - b. creativity
    - c. enthusiasm
    - d. fairness in dealing with others
    - e. handling work interruptions
    - f. initiative
    - g. loyalty
    - h. self-starter
    - i. open-mindedness
    - j. positive reinforcement
    - k. positive thinking
    - l. time management
    - m. economical use of materials and supplies
    - n. self-confidence
    - o. sense of humor
    - p. tactfulness
    - q. verbal, non-verbal expression
    - r. keeping informed of employer's growth, needs and deadlines

Objectives continued:

5. practice safe working habits, such as exercising care in:
    a. operating business machines
    b. using equipment - stapler, file cabinet, chair, typewriter
    c. maintaining an organized work area
    d. handling electrical cords, etc.
6. demonstrate leadership abilities in work situations, including:
    a. independent problem-solving ability
    b. independent decision-making ability
    c. ability to plan, coordinate and implement plans requiring teamwork.
    d. critiquing work of others and offering suggestions for improvement.
    e. ability to lead group activities
    f. ability to delegate tasks and responsibilities
    g. ability to prioritize tasks
7. relate accounting skills and abilities to careers utilizing those accounting skills and abilities.

Optional Competencies:

The student will be able to:

1. analyze financial statements for management decisions.
2. prepare statements of changes in financial positions.

Learner Outcomes:

Given the necessary information, the student will be able to journalize correctly the entries required for recording formation of a corporation.

1st SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Preface Chapter 1	1	Chapter 7
2	Chapter 2 Project 1, Part A	2	Chapter 8
3	Chapter 3 Project 1, Part B	3	Chapter 9 Begin Chapter 10
4	Accounting Test 8 Problem Test 8 Chapter 4	4	Complete Chapter 10 Project 2
5	Chapter 5	5	Chapter 11 Accounting Test 10 Problem Test 10
6	Chapter 6 Accounting Test 9 Problem Test 9	6	Chapter 12
7	Simulation 1	7	Chapter 13
8	Simulation 1	8	Chapter 14 Accounting Test 11 Problem Test 11
9	Simulation 1 Audit Test	9	Review Semester Exam

2nd SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Chapter 15	1	Accounting Test 12 Problem Test 12 Chapter 21
2	Chapter 16	2	Chapter 22
3	Chapter 17	3	Chapter 23
4	Simulation 2	4	Chapter 24 Accounting Test 13 Problem Test 13
5	Simulation 2	5	Chapter 25
6	Simulation 2 Audit Test	6	Chapter 26
7	Chapter 18	7	Chapter 27
8	Chapter 19	8	Chapter 28 Accounting Test 14 Problem Test 14
9	Chapter 20	9	Review FINAL EXAM

Name ______________________________

FIRST SEMESTER

Grade Goals						Tests	
Quar.	Sem.	Chapter	Problems	Date Completed	Study Guide	Objective	Problem
		1	1-1, 1-2, 1-3			☒	☒
		2	Project 1, Part A			☒	☒
		3	Project 1, Part B			Account. Test 8	Problem Test 8
		4	4-1, 4-2, 4-3, 4-4, 4-5, 4-M			☒	☒
		5	5-1, 5-2, 5-3, 5-4, 5-M, 5-B			☒	☒
		6	6-1			Account. Test 9	Problem Test 9
			Abrams & Silver Business Simulation			Audit Test	☒
		7	7-1, 7-2, 7-3, 7-4, 7-M			☒	☒
		8	8-1, 8-2, 8-3, 8-M			☒	☒
		9	9-1, 9-2, 9-3, 9-M			☒	☒
		10	10-1, 10-2			☒	☒
			Project 2		☒	☒	☒
		11	11-1, 11-M, 11-B			Account. Test 10	Problem Test 10
		12	12-1, 12-2, 12-3, 12-M, 12-B			☒	☒
		13	13-1, 13-2, 13-3, 13-4, 13-M, 13-B			☒	☒
		14	14-1, 14-2, 14-M. 14-B			Account. Test 11	Problem Test 11
			Semester Exam Chapter 1-14		☒		☒
			TOTALS				

Advanced Accounting Name ______________________

SECOND SEMESTER

Grade Goals						Tests	
Quar.	Sem.	Chapter	Problems	Date Completed	Study Guide	Objective	Problem
		15	15-1, 15-2, 15-M, 15-B			X	X
		16	16-1, 16-2, 16-3, 16-M, 16-B			X	X
		17	17-1, 17-2, 17-3, 17-4			X	X
			Custom Auto Center Business Simulation		X	Audit Test	X
		18	18-1, 18-2, 18-3, 18-4, 18-M, 18-B			X	X
		19	19-1, 19-M, 19-B			X	X
		20	20-1, 20-2, 20-3, 20-M, 20-B			Account. Test 12	Problem Test 12
		21	21-1, 21-2, 21-3, 21-M, 21-B			X	X
		22	22-1, 22-2, 22-M, 22-B			X	X
		23	23-1, 23-2, 23-3			X	X
		24	24-1, 24-2, 24-3			Account. Test 13	Problem Test 13
		25	25-1, 25-2, 25-3, 25-M, 25-B			X	X
		26	26-1, 26-2, 26-3			X	X
		27	27-1, 27-2, 27-3, 27-4, 27-M, 27-B			X	X
		28	28-1, 28-M, 28-B			Account. Test 14	Problem Test 14
			Semester Exam Chapters 15-28		X		X
			TOTALS				

ADVANCED ACCOUNTING Semester 1

Name ______________________ Date ________

Chapter	Homework	Study Guide		Possible	80%	Acct Test	Problem Test	%	Cum Total	Cum Possible			
1				30	24	X	X			30			
2	Project A Part A			68	54	X	X			98			
3	Project A Part B			54	43	X	X			152			
Acct Test 8	X	X	X	99	X		X			251			
Prob Test 8	X	X	X	139	X	X				390			
4				38	30	X	X			428			
5				45	36	X	X			473			
6				53	42	X	X			526			
Acct Test 9	X	X	X	54	X		X			580			
Prob Test 9	X	X	X	129	X	X				709			
Practice Set				45	76	X	X			804			
7				37	30	X	X			841			
8				36	29	X	X			877			
9				35	28	X	X			912			
10				39	31	X	X			951			
Project 2		X	X	X	X	X	X			—			

Chapter	Homework	Study Guide		Possible	80%	Acct Test	Problem Test	%	Cum Total	Cum Possible			
11				40	32	X	X			491			
Acc Test 10	X	X	X	60	X		X			1051			
Prob Test 10	X	X	X	202	X	X				1253			
12				39	31	X	X			1292			
13				37	30	X	X			1329			
14				38	30	X	X			1367			
Acct Test 11	X	X	X	60	X		X			1427			
Prob Test 11	X	X	X	86	X	X				1513			
SEM TEST	X	X	X	45	X		X			1558			

ADVANCED ACCOUNTING SEM. 2

Name ______________________ Date ____

Chapter	Homework	Study Guide		Possible	80%	Acct Test	Problem Test	%	Cum Total	Cum Possible				
15				40	32	X	X							
16				42	34	X	X							
17				67	54	X	X							
Custom Auto				100	80	X	X							
18				58	46	X	X							
19				40	32	X	X							
20				48	38	X	X							
Acct Test 12	X	X	X	89	X		X							
Tech Test 12	X	X	X	185	X	X								
21				40	32	X	X							
22				48	38	X	X							
23				36	29	X	X							
24				33	26	X	X							
Acct Test 13	X	X	X	86	X		X							
Test 13	X	X	X	105	X	X								
25				35	28	X	X							

Chapter	Homework	Study Guide		Possible	80%	Act Test	Problem Test	%	Cum Total	Cum Possible				
26				40	32	X	X							
27				38	30	X	X							
28				34	27	X	X							
Acct Test 14	X	X	X	55	X		X							
FINAL	X	X	X	60	X		X							

CONSUMER MATH

CONSUMER MATH

Consumer Math is designed to review basic math concepts and then expand them into the areas of consumer relations. We will be giving pretests to determine how much of the background material you will need to take, If you do not need to review any of the background material you will be allowed to go into the more advanced section of the book.

The basic text will be Vocational Consumer Math, Southwestern Publishing Company, which will be supplemented with Family Financial Management and other practice sets designed to give practical experiences in the consumer problems you will be faced.

You will be required to score 80% or better on all work that is turned in. If you do not do that, you will be given the work over again. Your instructor will help you with any problems that you may encounter. You must also score 80% or better on test work. With this type of a system, you will be guaranteed a good grade, if you complete the necessary points for the grade you are seeking.

Point Scale:

Quarter Points		Semester Points	
3000 - 2700	A	6000 - 5400	A
2699 - 2550	A-	5399 - 5100	A-
2549 - 2400	B+	5099 - 4800	B+
2399 - 2100	B	4799 - 4200	B
2099 - 1950	B-	4199 - 3900	B-
1949 - 1800	C+	3899 - 3600	C+
1799 - 1500	C	3599 - 3000	C
1499 - 1350	C-	2999 - 2700	C-
1349 - 1200	D+	2699 - 2400	D+
1199 - 900	D	2399 - 1800	D
899 - 750	D-	1799 - 1500	D-
749 - 0	X	Below 1500	X

Assignments

Assignments must be completed in the order given in the textbook. After each assignment a test will be given. At the end of each unit, a unit test will be given.

Assigned Seats

All students must be in their assigned seats - facing forward for the entire class period.

Unexcused Tardies and Absences

For each unexcused tardy (no note from previous period teacher, parent, or office), ½ hour detention will be awarded. For each unexcused absence, 1 hour of detention will be awarded. For each ½ hour of detention not served, 30 points will be deducted from your point total. Detention may also be assigned to those students not working during class or not working on assigned classroom material. One-half hour per occurance.

BASIC MINIMUM COMPETENCIES

Prerequisite: Office Machines or concurrent enrollment

Credit: 1

Satisfies: 1 vocational credit (recommend math credit for Business Education students)

After satisfactorily completing Business Math I, the student will be able to:

1. write numbers
   a. accurately
   b. legibly
2. demonstrate proper use and care of office machines used.
3. use business forms and information sources, including:
   a. shipping orders
   b. credit memos
   c. invoices
   d. computer input and output
4. take information from charts.
5. follow written directions.
6. follow oral directions.
7. correctly place decimals and commas in numbers.
8. round-off numbers.
9. mentally estimate answers to given problems.
10. add, subtract, multiply, and divide whole numbers:
    a. by hand calculation.
    b. by machine calculation.
11. add, subtract, multiply, and divide decimals:
    a. by hand calculation.
    b. by machine calculation.
12. add, subtract, multiply, and divide fractions:
    a. by hand calculation.
    b. by machine calculation.
13. add, subtract, multiply, and divide percentages:
    a. by hand calculation.
    b. by machine calculation.
14. change fractions to their decimal equivalents:
    a. with a conversion chart.
    b. without a conversion chart.
15. change decimals to their percentage equivalents.
16. change percentages to their decimal equivalents.
17. "think metric" by:
    a. using common metric prefixes.
    b. using common metric units.
    c. converting metric measurements within the metric system.

Objectives continued:

18. solve problems involving banking functions, including:
    a. checking accounts.
    b. bank deposits.
    c. bank statement reconciliations.
19. solve problems involving payroll preparation, including:
    a. determining hourly wage
    b. determining overtime salary
    c. determining piece work salary
    d. determining commissions earned
    e. determining tips earned
    f. using data from time cards
20. solve real estate problems, such as:
    a. calculating rental income
    b. determining costs of real investment
    c. verifying utility charges
    d. determining costs of property maintenance
21. calculate depreciation of business assets by the straight line method.
22. obtain information from travel schedules, including:
    a. bus schedules.
    b. airline schedules.
23. solve problems involving purchasing, including:
    a. quantity purchasing
    b. discounts
    c. verifying invoices for accuracy
    d. unit pricing
24. solve problems involving taxes, including:
    a. sales taxes
    b. social security taxes
    c. withholding taxes
25. identify and solve credit problems, such as:
    a. budget
    b. statement of financial condition
26. identify and solve credit problems, such as:
    a. interest
    b. installment payments
    c. collateral forms and requirements
    d. notes and drafts
    e. credit cards
27. interpret and utilize information from financial reports and graphs.
28. demonstrate ability to perform on employment testing to aid in more effective job searching.
29. identify careers utilizing business math and describe what the job requirements are and how they relate to the career.
30. define business terminology, including:
    a. 2/10, n/30
    b. M
    c. discount
    d. f.o.b.

Objectives continued:

31. identify the need for positive work habits in business offices, including:
    a. attendance
    b. punctuality
    c. good grooming
    d. dependability
    e. flexibility
    f. honesty
    g. self-discipline
    h. teamwork
    i. handling criticism
    j. discretely handling confidential information
    k. organizing work area
    l. managing time
32. display in classroom activities, growth and development in positive personal characteristics, including:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. sense of fairness
    e. initiative/self-starting
    f. loyalty
    g. open-mindedness
    h. positive reinforcement
    i. positive thinking
    j. self-confidence
    k. sense of humor
    l. tactfulness
33. practice safe working habits, such as exercising care in:
    a. operating business machines.
    b. using equipment - stapler, file cabinet, chair, typewriter.
    c. maintaining an organized work area.
    d. handling electrical cords, etc.
34. demonstrate leadership abilities in work situations, including:
    a. independent problem-solving ability.
    b. independent decision-making ability.
    c. ability to plan, coordinate, and implement plans requiring teamwork.
    d. critiquing work of others and offering suggestions for improvement.
    e. ability to lead group activities.
    f. ability to delegate tasks and responsibilities.
    g. ability to prioritize tasks.

Learner Outcomes:

1. Given the rate paid per item produced, and the number of items an employee produced, the student will be able to calculate with 100 percent accuracy the amount of salary the employee has earned.
2. Given an invoice, the student will, with 100 percent accuracy, be able to determine that the extensions are correct and that the total amount of the invoice is correct.
3. In a situation where an electrical cord on a machine is frayed, the student will exercise (or be able to identify) the steps to be taken to remedy the situation so that a safe working condition exists for the employee using the machine.

1st SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Section 1-1 - Check Test Section 1-2 - Check Test Section 1-3 - Check Test Section 1-4 - Check Test	1	Section 8-1 Section 8-2 Section 8-3
2	Section 1-5 - Check Test Chapter 1 Test Section 2-1 - Check Test Section 2-2 - Check Test	2	Chapter 8 Test Section 9-1 Section 9-2
3	Section 2-3 - Check Test Section 2-4 - Check Test Section 2-5 - Check Test	3	Section 9-3 Chapter 9 Test Section 10-1
4	Chapter 2 Test Section 3-1 - Check Test Section 3-2 - Check Test	4	Section 10-2 Chapter 10 Test Section 11-1
5	Chapter 3 Test Section 4-1 - Check Test Section 4-2 - Check Test	5	Section 11-2 Chapter 11 Test Section 12-1
6	Section 4-3 - Check Test Section 4-4 - Check Test Chapter 4 Test	6	Section 12-2 Chapter 12 Test Section 13-1
7	Section 5-1 - Check Test Section 5-2 - Check Test Chapter 5 Test	7	Section 13-2 Chapter 13 Test Section 14-1
8	Section 6-1 - Check Test Section 6-2 - Check Test Chapter 6 Test	8	Chapter 14 Test Practice Set
9	Section 7-1 Section 7-2 Chapter 7 Test	9	Practice Set

BUSINESS LAW

BUSINESS LAW

Business Law deals chiefly with that part of the law concerned with business life of your community. It involves your interest and ability to apply the law to problems of business and everyday life.

Ideal Time Line (One Semester)

Unit		Chapter(s)	Hours
1	Meaning of Law	1-5	5
2	Our Legal System	6-8	3
3	Nature of Contracts	9-15	20
4	Bailments	16-18	3
5	Sales	19-23	9
6	Debtors and Creditors	24-25	6
7	Employment and Agency	26-30	13-15
8	Negotiable Instruments	31-35	5
9	Insurance	36-40	12
10	Property	41-43	5
11	Business Organization & Regula.	44-45	5
12	Future		2-3
		TOTAL	88-91 hours

Grading:

Your grade will be based on quality and quantity of work performed according to the following scale:

Grade	Quantity	Quality
A	See Record	90%
B	Sheet for	80%
C	Quarter &	75%
D	Semester	70%

Chapter worksheets, tests, etc., will be averaged together to determine your quarter and semester average. If however, you have not maintained the quality level to match the quantity level, your grade will be lowered to that of the quality level.

All worksheets must be completed and turned in without error. If errors are found, they will be returned and they must be corrected. A maximum of 10 points will be assigned to each worksheet. In order to receive 10 points, worksheets must be done perfectly the first time. If errors are found on a worksheet, the maximum score is 8 points.

Materials Needed:

Applied Business Law, Fish and Mieters, 12th Edition, Southwestern Publishing Company

Seating Chart:

All students must be in their assigned seats - facing forward - for the entire period.

Unexcused Tardies and Absences:

For each unexcused tardy (no note from previous teacher, parent, or office), ½ hour of detention will be awarded. For each unexcused absence, 1 hour of detention will be awarded. For each ½ hour of detention not served, 30 points will be deducted from your quality score. Detention may also be awarded to those students not working in class or not working on assigned classroom material, ½ hour per occurance.

BASIC MINIMUM COMPETENCIES

Prerequisite:	Suggested Junior or Senior Level
Credit:	1
Satisfies:	1 vocational credit

After satisfactorily completing Business Law, the student will be able to:

1. identify the legal rights and responsibilities of minors and adults with regard to business transactions.
2. describe the importance of law and the courts in organized society.
3. describe the jurisdiction of each type of court in city, state, and federal government.
4. identify problems and circumstances which require legal counsel.
5. identify the differences between torts and crimes.
6. identify the basic characteristics of:
   a. individual proprietorships
   b. partnerships
   c. corporations
   d. cooperatives
7. describe the role of law relative to business enterprises:
   a. organization
   b. operation
   c. regulation
8. describe the legal relationship existing between employer and employee relative to:
   a. Workmen's Compensation Law
   b. Social Security Law
   c. OSHA/WISHA
   d. Federal Wage and Hour Law
   e. Civil Rights Act/Equal Opportunity Law
9. describe the basic elements of an oral or a written contract.
10. describe rights and responsibilities in the use of contracts, including:
    a. reading before signing.
    b. assigning of contract rights.
    c. discharging contract obligations.
    d. remedies for breach of contract.
11. describe the rights, duties, and liabilities of bailments:
    a. characteristics
    b. types
12. identify and describe features of laws designed to protect business and the consumer.
13. identify uses of warranties.

Objectives continued:

14. describe rights and responsibilities of parties relating to sales, including:
    a. personal property transactions.
    b. time title is passed.
    c. rights of buyer and seller.
    d. remedies of buyer and seller.
15. describe principal/agent relationships, including:
    a. formation
    b. obligations
    c. liabilities
16. explain the use and purpose of a power of attorney.
17. describe the property rights of individuals and/or businesses within our free enterprise system.
18. distinguish differences between real and personal property.
19. describe or identify legal features of:
    a. mortgages
    b. leases
    c. deeds
    d. rights and duties of landlords and tenants
20. describe or identify laws governing conditional sales, including:
    a. small loan laws.
    b. credit sales.
    c. installments.
21. describe legal features of negotiable instruments, including:
    a. transfers
    b. rights and obligations of all parties
22. identify careers utilizing business law and describe how business law relates to those careers.
23. follow written directions.
24. follow oral instructions.
25. identify the need for positive work habits in business offices, including:
    a. attendance
    b. punctuality
    c. good grooming
    d. dependability
    e. flexibility
    f. honesty
    g. self-discipline
    h. teamwork
    i. handling criticism
    j. handling confidential information discretely
    k. organizing work area
    l. managing time

Objectives continued:

26. display in classroom activities growth and development in positive personal characteristics, including:
    a. cooperation
    b. creativity
    c. enthusiasm
    d. sense of fairness
    e. initiative/self-starting
    f. loyalty
    g. open-mindedness
    h. positive reinforcement
    i. positive thinking
    j. self-confidence
    k. sense of humor
    l. tactfulness
27. demonstrate leadership abilities in work situations, including:
    a. independent problem-solving ability.
    b. independent decision-making ability.
    c. ability to plan, coordinate, and implement plans requiring teamwork.
    d. critiquing work of others and offering suggestions for improvement.
    e. ability to lead group activities.
    f. ability to delegate tasks and responsibilities.
    g. ability to prioritize tasks.
28. practice safe working habits, such as exercising care in:
    a. operating business machines.
    b. using equipment - stapler, file cabinet, chair, typewriter.
    c. maintaining an organized work area.
    d. handling electrical cords, etc.

Optional Competencies:

1. Trace the development of law from unwritten or common law to constitutional and statutory law.
2. Define insurable interest.
3. Describe the nature and characteristics of insurance, including:
    a. distribution of loss among policy holders.
    b. protection as the primary purpose.
4. Describe the options for adequate coverage by various types of insurance, such as:
    a. life
    b. property
    c. auto
    d. health
    e. accident
    f. disability

Learner Outcome:

1. Given a case situation describing a business transaction, the student will be able to identify the legal responsibilities involved in that situation. The point(s) of law involved must be accurately identified.
2. Given a list of five circumstances, the student will be able to identify with 80% accuracy those instances in which legal counsel should be sought.

Learner Outcomes continued:

3. In essay form, the student will be able to name three careers where a knowledge of business law is utilized. The careers named must be accurately identified and the relationship between business law and the career must be included in the answer.

SEMESTER TIME SCHEDULE

First Quarter		Second Quarter	
Week		Week	
1	Chapter 1 - Worksheet Chapter 2 - Worksheet Chapter 3 - Worksheet Chapter 4 - Worksheet	1	Chapter 24 - Worksheet Chapter 25 - Worksheet Review 24-25 - Worksheet Chapters 24-25 Test
2	Chapter 5 - Worksheet Review 1-5 - Worksheet Chapters 1-5 Test Chapter 6 - Worksheet	2	Chapter 26 - Worksheet Chapter 27 - Worksheet Chapter 28 - Worksheet Chapter 29 - Worksheet
3	Chapter 7 - Worksheet Chapter 8 - Worksheet Review 6-8 - Worksheet Chapters 6-8 Test	3	Chapter 30 - Worksheet Review 26-30 - Worksheet Chapters 26-30 Test Chapter 31 - Worksheet
4	Chapter 9 - Worksheet Chapter 10 - Worksheet Chapter 11 - Worksheet Review 9-11 - Worksheet	4	Chapter 32 - Worksheet Chapter 33 - Worksheet Chapter 34 - Worksheet Chapter 35 - Worksheet
5	Chapters 9-11 Test Chapter 12 - Worksheet Chapter 13 - Worksheet Chapter 14 - Worksheet	5	Review 31-35 - Worksheet Chapters 31-35 Test Chapter 36 - Worksheet Chapter 37 - Worksheet
6	Chapter 15 - Worksheet Review 12-15 - Worksheet Chapters 12-15 Test Chapter 16 - Worksheet	6	Chapter 38 - Worksheet Chapter 39 - Worksheet Chapter 40 - Worksheet Review 36-40 - Worksheet
7	Chapter 17 - Worksheet Chapter 18 - Worksheet Review 16-18 - Worksheet Chapters 16-18 Test	7	Chapters 36-40 Test Chapter 41 - Worksheet Chapter 42 - Worksheet Chapter 43 - Worksheet
8	Chapter 19 - Worksheet Chapter 20 - Worksheet Chapter 21 - Worksheet Chapter 22 - Worksheet	8	Review 41-43 - Worksheet Chapters 41-43 Test Chapter 44 - Worksheet Chapter 45 - Worksheet
9	Chapter 23 - Worksheet Review 19-23 - Worksheet Chapters 19-23 Test	9	Review 44-45 - Worksheet Chapters 44-45 Test Chapter 46 - Worksheet Final

BUSINESS LAW

Grade Goals						Tests	
Quar.	Sem.	Chapter	Assignments	Date Completed	Score	Unit	Score
		1	Worksheet			X	X
		2	Worksheet			X	X
		3	Worksheet			X	X
		4	Worksheet			X	X
		5	Worksheet			X	X
		Review	Worksheet			X	X
			Test - Unit 1	X	X		
		6	Worksheet			X	X
		7	Worksheet			X	X
		8	Worksheet			X	X
		Review	Worksheet			X	X
			Test - Unit 2	X	X		
		9	Worksheet			X	X
		10	Worksheet			X	X
		11	Worksheet			X	X
		Review	Worksheet			X	X
			Test - Unit 3, Part 1	X	X		
		12	Worksheet			X	X
		13	Worksheet			X	X
		14	Worksheet			X	X
		15	Worksheet			X	X
		Review	Worksheet			X	X
			Test - Unit 3, Part 2	X	X		
		16	Worksheet			X	X
		17	Worksheet			X	X
		18	Worksheet			X	X
		Review	Worksheet			X	X
			Test - Unit 4	X	X		
		19	Worksheet			X	X
		20	Worksheet			X	X
		21	Worksheet			X	X
		22	Worksheet			X	X
		23	Worksheet			X	X
		Review	Worksheet			X	X
			Test - Unit 5	X	X		

Grade Goals						Tests	
Quar.	Sem.	Chapter	Assignments	Date Completed	Score	Unit	Score
		24	Worksheet				
		25	Worksheet				
		Review	Worksheet				
			Test - Unit 6				
		26	Worksheet				
		27	Worksheet				
		28	Worksheet				
		29	Worksheet				
		30	Worksheet				
		Review	Worksheet				
			Test - Unit 7				
		31	Worksheet				
		32	Worksheet				
		33	Worksheet				
		34	Worksheet				
		35	Worksheet				
		Review	Worksheet				
			Test - Unit 8				
		36	Worksheet				
		37	Worksheet				
		38	Worksheet				
		39	Worksheet				
		40	Worksheet				
		Review	Worksheet				
			Test - Unit 9				
		41	Worksheet				
		42	Worksheet				
		43	Worksheet				
		Review	Worksheet				
			Test - Unit 10				
		44	Worksheet				
		45	Worksheet				
		Review	Worksheet				
			Test - Unit 11				
		46	Worksheet				
			FINAL EXAM				